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SUPPLEMENT TO THE FACT BOOK

STATISTICS AND MARKET DATA

CURRENT INFORMATION ABOUT DIRECT MARKETING AND DIRECT RESPONSE ADVERTISING

DIRECT MARKETING ASSOCIATION, INC.
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NEW YORK, NY 10017
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The Direct Marketing Association, Inc. is the largest and oldest international trade association representing users, creators and suppliers of direct mail advertising and other direct marketing techniques. DMA's 5,390 members from 2,716 companies represent a cross section of business and are located in all 50 states and 35 other countries. Offices are located at 6 East 43rd Street, New York, New York 10017 and 1101 17th Street NW, Washington, D.C. 20036.

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DMA STATISTICS ON SALES VOLUME AND DIRECT RESPONSE ADVERTISING EXPENDITURES

For some years, the DMA *Fact Book* has reported annual statistics for estimated total gross sales volume and for direct response advertising expenditures (by medium). These figures were calculated in a two-step process. First, advertising media expenditures were estimated through DMA's own research or in cooperation with other organizations. Expenditures for the various media were then totaled and multiplied by five as a formula for estimating gross sales.

Statistics for calendar 1983, the last year for which they were calculated by this method, were as follows:

1983 Estimated Direct Response Advertising Expenditures

	(In millions $)
Direct Mail (postage, paper & production)[1]	12,692.2
Magazines (mail order merchandise only)[2]	188.7
Business Magazines (industrial products only)[2]	73.9
Newspapers[3]	80.5
Newspaper Preprints[3]	2,850.0
Telephone[4]	13,608.3
Television[2]	386.5
Radio[2]	37.0
Coupons[5]	148.1
	$30,065.2

1. Source: Direct Marketing Association, Inc.
2. Source: HAI Industry Statistics/DMA projected growth percentage (1983 only)
3. Source: Newspaper Advertising Bureau/DMA projected growth percentage (1983 only)
4. Source: AT&T Communications, DMA estimate for 1983 only, based in part on information from AT&T
5. Source: Nielsen Clearing House

Note: Creative costs not included in any of above figures.

Using the multiplier formula, DMA estimated that total goods and service sold in the United States during 1983, as a result of direct marketing, amounted to $150.3 billion.

DMA Task Force Formed

As the direct marketing field has continued to grow, interest in statistics about the field, for use both by direct marketers and others, has also stepped up. At the same time, the Direct Marketing Association, Inc. has had an increasingly important role as a primary source for statistics. As a result, it has become particularly important that DMA statistics be as accurate as possible.

In March 1985, Jonah Gitlitz, DMA president, established a Task Force on Industry Statistics to reevaluate the Association's statistics-gathering programs and methodology. Pending completion of the Task Force review, DMA postponed issuing direct response advertising expenditure and total direct marketing sales figures for 1984.

The Task Force was chaired by Alexander C. Hoffman, group vice president, Doubleday & Company, Inc. Its members included: John A. Adams, president, DialAmerica Marketing, Inc.; Lawrence Crutcher, president & CEO, Book-of-the-Month Club; Leon Gorman, president, L.L. Bean, Inc.; William C. Johnson, president, Fingerhut Corporation; Paul Leblang, senior vice president/director of marketing, Saks Fifth Avenue; James O'Neill, vice president/corporate planning development, Fingerhut Corporation; and Seymour Turk, executive vice president, Book-of-the-Month Club.

The group first held a series of individual discussion meetings with individuals who have been closely identified with direct marketing statistics. Among them were: Martin Baier, executive vice president - marketing, Old American Insurance Company; Ed Burnett, president, Ed Burnett Consultant's Inc.; Robert Coen, senior vice president, McCann-Erickson, Inc.; Pete Hoke, president, Hoke Communications, Inc.; Robert Huppelsburg, Scull & Company; Arnold Fishman, president, Marketing Logistics, Inc.; Stan Rapp, chairman & CEO, Rapp & Collins, Inc.; Ira Schneiderman, account executive, National Family Opinion Research; and Maxwell Sroge, president, Maxwell Sroge Publishing. Robert D. Kestnbaum, president, Kestnbaum & Company also submitted written comments.

With these meetings providing overall guidance and background, the Task Force worked closely with DMA staff research and communications specialists and with a consulting firm to develop a long-range DMA statistics program.

Specific Steps

The first specific steps in the long-range program were taken earlier this year and others will follow:

- A survey of DMA member organizations to identify the markets they serve and the individual(s) who can best provide statistical information to DMA.
- A survey of DMA member organizations, with confidential responses channeled to Arthur Anderson & Company, a major accounting firm, so that no individual organization's data is revealed, to determine calendar 1985 direct response advertising expenditures (by media) and resulting gross sales volumes in various market segments. The results are expected to be announced at the DMA Annual Conference, October 26-29 in Las Vegas, Nevada.
- In early 1987, a similar survey of DMA member organizations, plus representative non-member organizations in those market segments where it appears to be appropriate, of calendar 1986 total direct response advertising expenditures (by media) and resulting gross sales volumes.
- In future years, similar studies will expand both the base of organizations surveyed and the information gathered.
- Beginning in 1987, with DMA member studies, information of value to direct marketing managers (e.g. average production costs by media) will also be gathered.

MEDIA

1 MAIL ORDER

7 ADVERTISING

10 DIRECT MAIL

19 CATALOGS

26 TELEPHONE DIRECTORY ASSISTANCE

27 TELEVISION

34 PRINT MEDIA

DATE _____

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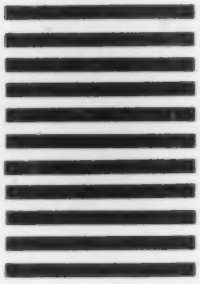

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1985 SIMMONS STUDY OF MEDIA AND MARKETS

Demographics gathered through personal interviews; product usage, and buying behavior gathered through self-administered questionnaires. This syndicated study is based on a stratified multi-stage area probability sample of 19,159 adults (18 and older) interviewed between August 1984 and June 1985.

PERCENT OF TOTAL POPULATION ORDERING MAIL ORDER ITEMS IN PAST 12 MONTHS

	TOTAL U.S. (000)	ANY PRODUCT	COOK BOOKS	BOOK CLUB BOOKS	COSMETICS	RECORDS	MAGAZINES	PHOTO PROCESSING	FRUIT, CHEESE, SPECIALTY FOODS	CLOTHING	VITAMINS
TOTAL ADULTS	169,460	45.0	3.6	6.6	3.3	3.9	18.6	3.0	1.9	19.9	2.4
MALES	80,052	39.3	2.0	5.0	1.3	3.8	15.7	2.5	1.5	13.2	2.2
FEMALES	89,408	50.0	5.0	8.0	5.1	4.1	21.3	3.5	2.2	25.8	2.7
18-24	28,611	37.6	3.4	4.4	4.6	4.6	16.1	2.4	1.0	13.2	1.7
25-34	40,058	48.3	3.3	9.3	3.5	4.9	22.7	4.2	1.5	18.7	1.6
35-44	30,132	52.2	4.6	8.9	3.6	4.1	21.9	4.2	2.2	23.7	2.5
45-54	22,317	48.9	3.9	6.7	3.7	3.1	18.4	2.9	2.7	23.9	3.2
55-64	21,993	44.0	3.3	5.0	3.1	3.7	16.9	2.1	1.8	23.7	3.3
65 OR OLDER	26,350	37.0	2.9	3.4	1.2	2.4	13.1	1.5	2.3	17.7	3.0
GRADUATED COLLEGE	28,689	55.5	2.8	10.4	3.2	5.1	24.7	4.2	3.5	26.6	3.0
ATTENDED COLLEGE	29,760	50.7	4.8	9.0	4.5	4.2	22.0	3.9	2.0	21.5	2.5
GRADUATED HIGH SCHOOL	67,306	46.6	4.0	6.0	3.7	4.5	19.3	3.1	1.8	21.1	2.6
DID NOT GRADUATE HIGH SCHOOL	43,705	31.6	2.6	3.3	2.0	2.1	11.3	1.5	0.7	12.4	1.8
PROFESSIONAL/MANAGER	26,470	55.5	4.3	12.1	3.4	4.8	23.8	3.5	2.9	25.1	2.7
TECHNICAL/CLERICAL/ SALES	31,679	52.3	4.4	7.7	5.9	5.4	23.9	4.2	2.3	24.5	2.6
PRECISION/CRAFT	12,857	41.0	2.2	5.3	2.0	3.8	16.1	2.5	1.2	13.1	2.2
OTHER EMPLOYED	31,060	39.6	2.6	4.7	2.8	3.1	14.9	2.2	1.0	14.8	1.9
SINGLE	36,345	38.5	3.1	4.2	3.5	4.4	16.0	2.3	1.5	14.4	1.9
MARRIED	103,592	49.1	3.9	7.6	3.4	4.0	20.6	3.7	2.0	22.6	2.6
DIVORCED, SEPARATED, WIDOWED	29,524	38.4	3.2	6.0	3.0	3.2	15.0	1.7	1.8	17.0	2.6
PARENTS	58,373	49.9	3.9	8.7	3.7	3.9	21.8	4.4	2.0	22.1	1.8
NORTHEAST	38,103	42.4	3.0	5.8	3.0	4.2	16.3	4.8	2.3	21.1	2.8
EAST CENTRAL	24,421	47.2	3.7	6.7	2.6	3.3	18.6	3.8	1.6	20.8	3.1
WEST CENTRAL	28,542	49.6	3.3	6.7	3.2	4.6	20.4	2.9	2.1	23.6	2.7
SOUTH	49,737	41.5	3.9	5.9	3.8	3.5	17.3	1.9	1.6	17.1	1.7
PACIFIC	28,658	47.8	4.0	8.5	3.7	4.1	22.2	2.1	1.7	18.4	2.5

PERCENT OF TOTAL POPULATION ORDERING MAIL ORDER ITEMS IN PAST 12 MONTHS

	NEEDLE-CRAFT KITS, SUPPLIES	TOOLS	COOKWARE, KITCHEN ACCESSORIES	TREES, PLANTS, SEEDS	AUTO ACCESSORIES	OTHER BOOKS	INVESTMENT INFORMATION	SHOES & BOOTS	AUDIO CASSETTE TAPES	TRAVEL/ TOUR INFORMATION
TOTAL ADULTS	2.5	2.2	2.6	4.7	4.3	4.9	1.4	5.8	3.4	3.1
MALES	0.8	3.2	1.3	3.5	6.1	4.4	1.7	4.2	3.0	2.5
FEMALES	4.0	1.2	3.8	5.7	2.6	5.3	1.1	7.2	3.9	3.6
18–24	1.4	1.4	2.1	2.6	3.6	4.2	0.8	4.1	3.5	2.2
25–34	2.5	2.4	2.8	4.1	4.8	5.1	1.5	6.1	3.7	3.0
35–44	2.9	2.4	3.0	5.8	5.5	5.0	2.0	6.1	4.1	3.5
45–54	3.0	2.5	2.7	7.1	6.1	6.9	0.9	6.5	4.1	3.1
55–64	2.6	2.5	2.6	5.3	3.2	4.9	2.1	6.8	2.6	4.1
65 OR OLDER	2.6	1.8	2.1	3.9	2.4	3.7	1.0	5.4	2.4	2.8
GRADUATED COLLEGE	2.4	3.4	3.7	6.6	5.4	7.3	3.1	6.9	3.8	6.0
ATTENDED COLLEGE	2.8	2.0	2.7	4.6	4.9	6.5	2.4	5.9	4.1	4.4
GRADUATED HIGH SCHOOL	3.1	2.2	2.5	4.6	4.7	4.9	0.9	6.5	4.1	2.5
DIDN'T GRADUATE HIGH SCHOOL	1.4	1.4	1.8	3.4	2.5	2.3	0.3	4.0	1.8	1.1
PROFESSIONAL/MANAGER	2.3	2.4	3.6	6.3	5.2	7.0	2.6	6.7	3.4	4.8
TECHNICAL/CLERICAL/SALES	3.0	2.5	3.3	4.8	4.5	5.6	1.9	6.8	5.3	3.7
PRECISION/CRAFT	1.1	3.6	1.9	4.0	7.5	3.7	1.4	3.8	3.2	2.0
OTHER EMPLOYED	1.8	2.2	2.5	4.0	4.7	3.9	1.0	4.9	2.5	1.6
SINGLE	1.3	2.0	2.3	2.6	4.6	4.7	1.1	4.8	3.2	2.9
MARRIED	3.0	2.4	2.7	5.8	4.6	5.2	1.5	6.6	3.6	3.4
DIVORCED/SEPARATED/ WIDOWED	2.3	1.4	2.4	3.4	2.8	4.4	1.4	4.3	3.0	2.3
PARENTS	2.7	2.3	2.6	5.3	5.0	4.8	1.6	6.2	4.1	2.5
NORTHEAST	2.7	2.3	2.7	4.7	4.2	4.5	1.3	5.1	3.0	3.2
EAST CENTRAL	2.6	2.3	2.4	4.3	4.6	4.4	1.4	6.7	3.7	3.1
WEST CENTRAL	3.8	2.4	2.8	6.3	5.1	6.1	1.7	7.1	3.4	3.9
SOUTH	1.6	1.9	1.7	3.6	4.1	4.4	1.0	5.8	3.4	2.3
PACIFIC	2.4	2.1	4.0	5.2	3.7	5.6	1.9	4.8	4.0	3.4

Source: Simmons Market Research Bureau: 1985 Study of Media and Markets

PERCENT OF TOTAL POPULATION ORDERING MAIL ORDER ITEMS IN PAST 12 MONTHS

	TOTAL U.S. (000)	ANY PRODUCT	COOK BOOKS	BOOK CLUB BOOKS	COSMETICS	RECORDS	MAGAZINES	PHOTO PROCESSING	FRUIT, CHEESE, SPECIALTY FOODS	CLOTHING	VITAMINS
METRO CENTRAL CITY	50,827	41.4	3.8	6.1	3.3	3.7	17.4	2.4	2.3	16.2	2.5
METRO SUBURBAN	77,471	46.2	3.4	6.7	3.2	3.8	19.3	3.1	1.7	20.6	2.5
NON-METRO	41,162	46.9	3.6	6.9	3.4	4.3	18.9	3.7	1.5	23.0	2.3
HOUSEHOLD INCOME											
$50,000 OR MORE	20,974	54.2	4.3	9.0	3.6	4.1	23.6	3.3	2.8	26.6	2.3
$40,000 OR MORE	38,603	54.8	3.7	8.9	3.6	4.4	24.0	3.5	2.4	25.3	2.6
$30,000 OR MORE	65,657	53.0	4.0	8.4	3.9	4.7	23.3	3.5	2.4	24.4	2.6
$25,000 OR MORE	82,501	51.8	3.9	8.4	3.7	4.4	22.7	3.6	2.3	23.3	2.6
$20,000–$24,999	18,523	46.3	3.8	7.2	3.2	4.9	17.6	3.8	2.2	20.6	3.2
$15,000–$19,999	15,987	44.8	3.7	6.8	3.7	4.0	18.5	3.3	2.0	20.0	2.1
$10,000–$14,999	23,682	38.7	3.0	4.0	3.1	2.9	14.8	2.5	1.2	19.5	2.0
UNDER $10,000	28,767	29.6	3.0	2.9	2.3	2.7	10.7	1.3	0.7	11.3	2.0
HOUSEHOLD SIZE											
1 PERSON	20,053	37.6	2.8	5.0	2.0	4.1	15.7	2.0	2.7	15.1	2.9
2 PEOPLE	52,536	44.0	3.6	6.6	3.4	4.4	17.8	2.4	1.8	19.8	3.1
3 OR 4 PEOPLE	68,502	47.8	3.7	7.3	3.3	3.7	19.5	3.9	2.0	21.6	2.2
5 OR MORE PEOPLE	28,369	45.1	3.8	5.9	4.2	3.4	20.2	3.0	1.0	19.0	1.7
CHILDREN											
NO CHILD IN HOUSEHOLD	98,374	43.5	3.4	5.7	3.1	4.1	17.2	2.6	2.0	19.3	3.0
CHILDREN UNDER											
2 YEARS	10,921	49.3	3.6	8.8	3.9	2.6	23.4	4.8	1.9	21.5	0.9
2–5 YEARS	25,334	48.3	3.6	9.8	3.9	4.4	21.8	5.1	0.9	19.7	1.1
6–11 YEARS	31,780	46.3	4.4	8.3	4.0	4.1	19.9	3.7	1.9	20.7	1.8
12–17 YEARS	35,615	45.8	3.8	8.0	3.9	3.5	20.4	3.4	1.6	21.2	2.1
RESIDENCE OWNED	118,551	48.5	3.6	6.6	3.4	3.8	19.5	3.3	2.2	22.8	2.8
VALUE $60,000 OR MORE	59,901	51.1	3.5	7.1	3.2	3.7	20.7	3.3	2.7	24.9	2.5
VALUE LESS THAN $60,000	58,650	45.8	3.6	6.2	3.6	3.9	18.3	3.2	1.7	20.6	3.0

PERCENT OF TOTAL POPULATION ORDERING MAIL ORDER ITEMS IN PAST 12 MONTHS

	NEEDLE-CRAFT KITS, SUPPLIES	TOOLS	COOKWARE, KITCHEN ACCESSORIES	TREES, PLANTS, SEEDS	AUTO ACCESSORIES	OTHER BOOKS	INVESTMENT INFORMATION	SHOES & BOOTS	AUDIO CASSETTE TAPES	TRAVEL/ TOUR INFORMATION
METRO CENTRAL CITY	1.9	1.9	2.6	3.4	3.7	4.8	1.4	4.7	3.1	2.8
METRO SUBURBAN	2.8	2.2	2.9	4.8	4.4	4.8	1.5	5.5	3.3	3.5
NON-METRO	2.6	2.4	2.1	5.9	4.7	5.3	1.2	7.7	4.1	2.6
HOUSEHOLD INCOME										
$50,000 OR MORE	2.4	3.1	3.4	6.5	6.3	7.1	2.8	6.8	4.2	5.7
$40,000 OR MORE	2.5	2.8	3.2	6.2	6.1	6.4	2.5	6.7	4.5	4.9
$30,000 OR MORE	2.7	2.7	3.1	5.9	5.5	6.0	2.2	6.6	4.1	4.3
$25,000 OR MORE	2.7	2.6	3.0	5.7	5.5	5.7	2.0	6.2	4.0	4.2
$20,000–$24,999	2.8	1.8	2.7	4.9	4.0	5.4	1.1	6.3	3.9	2.6
$15,000–$19,999	2.5	2.6	2.2	5.1	4.3	5.2	0.9	7.2	3.8	2.2
$10,000–$14,999	2.5	1.9	2.4	3.5	2.5	3.7	0.8	5.5	2.7	2.2
UNDER $10,000	1.5	1.1	1.7	2.9	2.3	3.2	0.7	3.8	2.1	1.3
HOUSEHOLD SIZE										
1 PERSON	3.1	1.6	2.7	3.4	3.2	5.4	1.7	5.1	2.2	2.7
2 PEOPLE	2.5	2.4	2.9	4.7	3.5	4.8	1.3	5.6	2.9	3.7
3 OR 4 PEOPLE	2.5	2.3	2.6	5.2	5.0	4.9	1.5	5.7	4.2	2.8
5 OR MORE PEOPLE	2.1	1.8	2.0	4.3	4.9	4.8	1.3	6.9	3.6	2.7
CHILDREN										
NO CHILD IN HOUSEHOLD	2.6	2.2	2.8	4.8	4.0	5.1	1.3	5.7	3.2	3.4
CHILDREN UNDER										
2 YEARS	2.9	2.0	2.8	4.4	4.1	4.7	1.6	7.3	2.8	2.0
2–5 YEARS	2.6	2.4	2.1	5.2	4.9	4.7	1.2	7.1	4.3	2.3
6–11 YEARS	2.0	2.0	2.2	4.6	4.9	4.0	1.8	6.4	4.2	3.1
12–17 YEARS	2.2	2.1	2.3	4.5	4.5	5.1	1.5	5.8	4.0	2.7
RESIDENCE OWNED	2.9	2.5	2.6	5.7	4.8	5.4	1.6	6.6	3.5	3.6
VALUE $60,000 OR MORE	3.0	2.9	2.8	6.1	5.1	5.7	2.0	6.9	3.6	4.8
LESS THAN $60,000	2.8	2.1	2.4	5.3	4.5	5.0	1.1	6.3	3.4	2.3

Source: Simmons Market Research Bureau, 1985 Study of Media and Markets

DEMOGRAPHIC PROFILE OF BUYERS OF MAIL ORDER ITEMS IN PAST 12 MONTHS

	TOTAL BUYERS (000)	ANY PRODUCT	COOK BOOKS	BOOK CLUB BOOKS	COSMETICS	RECORDS	MAGAZINES	PHOTO PROCESSING	FRUIT, CHEESE, SPECIALTY FOODS	CLOTHING	VITAMINS
TOTAL ADULTS	76,182	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
MALES	31,495	41.3	25.9	35.9	18.9	45.3	39.7	38.7	37.0	31.5	42.2
FEMALES	44,687	58.7	74.1	64.1	81.1	54.7	60.3	61.3	63.0	68.5	57.8
18–24	10,754	14.1	16.2	11.2	23.2	19.6	14.6	13.3	9.4	11.3	12.0
25–34	19,350	25.4	22.1	33.4	25.0	29.6	28.8	32.9	19.1	22.3	15.2
35–44	15,727	20.6	23.1	24.0	19.3	18.7	20.9	24.7	21.0	21.2	18.4
45–54	10,921	14.3	14.4	13.5	14.6	10.4	13.0	12.6	18.8	15.8	17.5
55–64	9,675	12.7	11.8	9.9	12.1	12.3	11.8	8.9	12.3	15.5	17.6
65 OR OLDER	9,755	12.8	12.4	8.0	5.7	9.4	10.9	7.6	19.4	13.9	19.3
GRADUATED COLLEGE	15,909	20.9	13.5	26.9	16.4	22.0	22.4	23.5	32.1	22.7	20.8
ATTENDED COLLEGE	15,094	19.8	23.6	24.0	23.9	18.9	20.8	22.8	18.8	19.0	17.8
GRADUATED HIGH SCHOOL	31,359	41.2	44.3	36.2	44.2	45.2	41.1	41.2	38.9	42.2	42.5
DIDN'T GRADUATE HIGH SCHOOL	13,819	18.1	18.7	12.9	15.5	14.0	15.7	12.5	10.2	16.1	18.9
PROFESSIONAL/MANAGER	14,694	19.3	18.9	28.8	16.0	19.2	19.9	18.3	24.2	19.8	17.4
TECHNICAL/CLERICAL/ SALES	16,562	21.7	22.8	21.8	33.0	25.7	24.0	26.1	22.6	23.1	20.0
PRECISION/CRAFT	5,272	6.9	4.6	6.1	4.7	7.4	6.6	6.3	4.8	5.0	6.8
OTHER EMPLOYED	12,302	16.1	13.6	13.0	15.4	14.7	14.7	13.2	9.8	13.6	14.3
SINGLE	13,991	18.4	18.3	13.6	22.5	23.8	18.4	16.0	17.4	15.6	17.0
MARRIED	50,859	66.8	66.1	70.6	61.9	61.9	67.6	74.1	65.9	69.5	64.5
DIVORCED/SEPARATED/ WIDOWED	11,332	14.9	15.6	15.8	15.7	14.3	14.0	9.9	16.8	14.9	18.4
PARENTS	29,115	38.2	37.3	45.8	38.3	34.0	40.4	49.6	36.7	38.3	25.3
NORTHEAST	16,154	21.2	18.6	19.8	20.2	23.8	19.6	35.4	27.6	23.9	26.2
EAST CENTRAL	11,525	15.1	14.9	14.7	11.2	12.0	14.4	18.0	12.2	15.1	18.0
WEST CENTRAL	14,161	18.6	15.4	17.2	16.4	20.0	18.5	16.2	19.4	20.1	18.8
SOUTH	20,654	27.1	32.4	26.3	33.4	26.5	27.3	18.7	25.4	25.2	20.0
PACIFIC	13,688	18.0	18.7	22.0	18.8	17.7	20.2	11.7	15.3	15.7	17.0

DEMOGRAPHIC PROFILE OF BUYERS OF MAIL ORDER ITEMS IN PAST 12 MONTHS

	NEEDLE-CRAFT KITS, SUPPLIES	TOOLS	COOKWARE, KITCHEN ACCESSORIES	TREES, PLANTS, SEEDS	AUTO ACCESSORIES	OTHER BOOKS	INVESTMENT INFORMATION	SHOES BOOTS	AUDIO CASSETTE TAPES	TRAVEL/ TOUR INFORMATION
TOTAL ADULTS	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
MALES	14.3	70.5	23.0	35.7	67.7	42.6	57.7	34.4	40.7	37.9
FEMALES	85.7	29.5	77.0	64.3	32.3	57.4	42.3	65.7	59.3	62.2
18–24	9.7	10.7	13.6	9.4	14.1	14.5	9.6	12.0	17.4	11.9
25–34	23.9	25.8	25.7	20.6	26.3	24.5	25.9	24.9	25.4	23.1
35–44	20.6	20.0	20.8	22.3	22.7	18.1	25.4	18.6	21.1	20.3
45–54	16.1	15.4	13.9	20.1	18.7	18.4	8.3	14.8	15.8	13.4
55–64	13.7	15.2	13.2	14.8	9.6	12.9	19.3	15.3	9.7	17.2
65 OR OLDER	16.1	12.9	12.7	12.9	8.6	11.6	11.4	14.6	10.6	14.1
GRADUATED COLLEGE	16.1	26.8	24.2	24.1	21.4	25.0	37.7	20.2	16.9	33.3
ATTENDED COLLEGE	19.9	16.4	18.7	17.5	20.1	23.3	30.6	18.0	20.7	25.1
GRADUATED HIGH SCHOOL	49.2	39.6	39.2	39.4	43.8	39.7	25.3	44.2	47.1	32.3
DIDN'T GRADUATE HIGH SCHOOL	14.8	17.2	18.0	19.0	14.9	12.0	6.4	17.7	13.3	9.3
PROFESSIONAL/MANAGER	14.5	17.5	22.0	21.0	18.9	22.4	29.0	18.0	15.3	24.3
TECHNICAL/CLERICAL/ SALES	22.6	21.3	23.9	19.1	19.7	21.4	25.3	21.9	28.7	22.3
PRECISION/CRAFT	3.2	12.5	5.7	6.6	13.3	5.8	7.8	4.9	7.1	5.0
OTHER EMPLOYED	13.4	18.2	17.7	15.7	20.3	14.5	12.5	15.6	13.4	9.3
SINGLE	11.3	19.8	19.0	11.7	23.0	20.5	17.1	17.8	20.2	20.2
MARRIED	72.5	69.2	65.0	75.7	65.7	64.0	65.1	69.4	64.7	67.0
DIVORCED/SEPARATED/ WIDOWED	16.3	11.0	16.0	12.6	11.3	15.5	17.8	12.8	15.1	12.8
PARENTS	37.1	37.0	35.2	38.8	40.2	33.3	39.3	37.1	41.2	28.0
NORTHEAST	24.4	23.9	23.5	22.6	21.8	20.4	20.6	20.0	19.4	23.3
EAST CENTRAL	15.2	15.2	13.3	13.1	15.4	12.8	14.7	16.5	15.4	14.5
WEST CENTRAL	25.5	18.7	18.4	22.7	20.1	20.8	20.5	20.5	16.5	21.2
SOUTH	18.9	25.6	18.8	22.6	28.1	26.6	21.4	29.1	29.0	22.2
PACIFIC	16.1	16.6	26.1	19.0	14.6	19.4	22.8	14.0	19.7	18.8

Source: Simmons Market Research Bureau: 1985 Study of Media and Markets

DEMOGRAPHIC PROFILE OF BUYERS OF MAIL ORDER ITEMS IN PAST 12 MONTHS

	TOTAL BUYERS (000)	ANY PRODUCT	COOK BOOKS	BOOK CLUB BOOKS	COSMETICS	RECORDS	MAGAZINES	PHOTO POCESSING	FRUIT, CHEESE, SPECIALTY FOODS	CLOTHING	VITAMINS
TOTAL ADULTS	76,182	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
METRO CENTRAL CITY	21,065	27.7	31.7	27.9	30.2	28.7	28.0	23.4	37.7	24.5	30.8
METRO SUBURBAN	35,803	47.0	43.6	46.6	44.7	44.8	47.4	46.5	42.2	47.5	46.1
NON-METRO	19,314	25.4	24.7	25.6	25.2	26.6	24.6	30.0	20.2	28.1	23.1
HOUSEHOLD INCOME											
$50,000 OR MORE	11,373	14.9	15.0	16.9	13.4	13.0	15.7	13.6	18.8	16.6	11.5
$40,000 OR MORE	21,158	27.8	23.7	30.8	24.4	25.5	29.3	26.6	29.5	29.0	24.3
$30,000 OR MORE	34,796	45.7	42.9	49.7	45.0	46.6	48.6	44.8	50.5	27.5	41.1
$25,000 OR MORE	42,765	56.1	52.7	62.5	54.1	54.6	59.4	57.6	61.3	47.2	51.6
$20,000–$24,999	8,575	11.3	11.6	11.9	10.7	13.7	10.4	13.7	12.8	11.3	14.3
$15,000–$19,999	7,169	9.4	9.6	9.7	10.6	9.7	9.4	10.2	10.2	9.5	8.2
$10,000–$14,999	9,169	12.0	11.9	8.5	12.9	10.4	11.1	11.5	9.4	13.7	11.7
UNDER $10,000	8,503	11.2	14.1	7.4	11.8	11.7	9.8	7.1	6.4	9.6	14.2
HOUSEHOLD SIZE											
1 PERSON	7,549	9.9	9.3	9.1	7.3	12.2	10.0	7.7	16.9	9.0	13.8
2 PEOPLE	23,121	30.3	31.1	31.1	31.4	34.8	29.6	24.3	30.2	30.9	38.9
3 OR 4 PEOPLE	32,724	43.0	42.0	44.9	40.1	38.6	42.2	51.7	44.0	44.0	35.8
5 OR MORE PEOPLE	12,787	16.8	17.7	14.9	21.2	14.4	18.2	16.4	8.8	16.0	11.5
CHILDREN											
NO CHILD IN HOUSEHOLD	42,822	56.2	55.9	50.4	54.5	60.9	53.6	49.0	61.4	56.5	70.5
CHILDREN UNDER											
2 YEARS	5,388	7.1	6.6	8.6	7.6	4.3	8.1	10.1	6.7	7.0	2.4
2–5 YEARS	12,237	16.1	15.0	22.2	17.4	16.9	17.5	25.1	7.6	14.8	6.9
6–11 YEARS	14,712	19.3	23.1	23.7	22.8	19.8	20.0	22.9	19.1	19.5	13.6
12–17 YEARS	16,294	21.4	22.3	19.3	24.8	18.6	23.0	23.6	17.8	22.5	17.8
RESIDENCE OWNED	57,477	75.4	69.6	70.4	71.6	67.2	73.4	75.3	82.4	80.3	78.9
VALUE $60,000 OR MORE	30,610	40.2	35.0	38.0	33.7	33.0	39.4	38.5	51.4	44.3	36.8
VALUE LESS THAN $60,000	26,867	35.3	34.5	32.5	37.9	34.2	34.0	36.7	31.1	36.0	42.1

DEMOGRAPHIC PROFILE OF BUYERS OF MAIL ORDER ITEMS IN PAST 12 MONTHS

	NEEDLE-CRAFT KITS, SUPPLIES	TOOLS	COOKWARE, KITCHEN ACCESSORIES	TREES, PLANTS, SEEDS	AUTO ACCESSORIES	OTHER BOOKS	INVESTMENT INFORMATION	SHOES & BOOTS	AUDIO CASSETTE TAPES	TRAVEL/ TOUR INFORMATION
TOTAL ADULTS	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
METRO CENTRAL CITY	22.8	25.9	29.7	22.1	26.2	29.5	30.2	24.1	27.3	27.7
METRO SUBURBAN	51.4	46.9	50.7	47.4	47.2	44.4	49.3	43.6	44.0	51.7
NON-METRO	25.8	27.3	19.6	30.5	26.5	26.2	20.4	32.3	28.7	20.6
HOUSEHOLD INCOME										
$50,000 OR MORE	12.0	18.0	16.5	17.2	18.1	17.9	24.8	14.5	15.0	22.9
$40,000 OR MORE	23.1	29.8	28.1	30.3	32.4	29.8	41.2	26.3	29.7	36.0
$30,000 OR MORE	42.8	48.9	46.3	48.6	49.6	47.6	61.9	44.1	45.9	54.6
$25,000 OR MORE	53.5	58.7	56.6	59.1	62.7	56.7	69.4	52.1	56.3	66.5
$20,000–$24,999	12.3	9.0	11.4	11.4	10.3	11.9	8.5	11.9	12.3	9.4
$15,000–$19,999	9.6	11.2	8.2	8.3	9.6	10.0	6.0	11.7	10.3	6.8
$10,000–$14,999	14.3	12.5	12.8	10.6	8.2	10.5	8.1	13.2	10.9	9.9
UNDER $10,000	10.4	8.6	11.0	10.6	9.3	11.0	7.9	11.2	10.2	7.3
HOUSEHOLD SIZE										
1 PERSON	14.7	8.5	12.4	8.6	8.8	13.0	14.3	10.4	7.5	10.5
2 PEOPLE	30.8	34.1	34.3	31.1	25.3	30.0	27.9	30.1	26.1	37.6
3 OR 4 PEOPLE	40.4	43.1	40.4	44.9	47.0	40.5	41.9	39.8	48.9	37.2
5 OR MORE PEOPLE	14.2	14.3	12.9	15.3	19.0	16.4	16.0	19.8	17.5	14.7
CHILDREN										
NO CHILD IN HOUSEHOLD	59.5	59.1	63.1	59.7	54.2	60.3	54.4	57.0	53.5	64.4
CHILDREN UNDER										
2 YEARS	7.6	6.0	6.9	6.1	6.1	6.2	7.2	8.1	5.2	4.2
2–5 YEARS	15.8	16.9	12.3	16.7	17.2	14.2	13.3	18.4	18.7	11.2
6–11 YEARS	15.0	17.0	15.9	18.6	21.6	15.3	23.7	20.7	22.7	19.0
12–17 YEARS	18.7	20.7	18.7	20.2	22.3	21.6	23.0	21.1	24.3	18.2
RESIDENCE OWNED	80.9	82.2	70.7	85.1	78.8	76.2	77.5	79.6	71.3	81.4
VALUE $60,000 OR MORE	42.1	48.1	38.4	46.0	42.3	41.0	49.9	42.2	37.3	55.1
VALUE LESS THAN $60,000	38.8	34.1	32.3	39.2	36.5	35.2	27.7	37.4	33.9	26.3

Source: Simmons Market Research Bureau: 1985 Study of Media and Markets

BETTER HOMES AND GARDENS STUDY OF MAIL ORDER PURCHASES

The following information is from a September, 1984 mailing to Panel A, 500 nationally distributed members of the 1,000 member Better Homes and Gardens Consumer Panel. 425 completed questionnaires (85.0% response) were tabulated.

ITEMS INQUIRED ABOUT BY MAIL FROM ANY SOURCE IN THE PAST 12 MONTHS

CATALOGS	10.3%	FUND RAISING CONTRIBUTION	3.5%
CRAFTS/CRAFT KITS	8.8%	HOME STUDY COURSES	3.2%
CURTAINS	8.2%	JEWELRY	2.9%
SEEDS, BULBS, PLANTS	6.8%	HEALTH FOODS	2.6%
DECORATIONS	6.5%	HOUSEWARES	2.1%
FURNITURE/ FURNITURE KITS	6.5%	MAGAZINE SUBSCRIPTION OFFER	2.1%
APPAREL/FOOTWEAR	5.6%	RECORDS/TAPES	2.1%
GIFT MERCHANDISE	5.3%	PHOTOS AND PHOTO ACCESSORIES	1.8%
BOOKS	4.7%	STATIONARY	0.9%
FOOD/CHEESE/FRUIT PACKAGES	4.4%	OTHER	1.8%
INSURANCE	4.4%	DON'T KNOW/ NO ANSWER	65.0%
COLLECTIBLES	4.1%		

ITEMS BOUGHT BY MAIL FROM ANY SOURCE IN THE PAST 12 MONTHS

APPAREL/ FOOTWEAR	55.9%	DECORATIONS	14.7%
MAGAZINE SUBSCRIPTION OFFER	41.2%	COLLECTIBLES	13.2%
GIFT MERCHANDISE	34.7%	PHOTOS AND PHOTO ACCESSORIES	9.4%
BOOKS	33.8%	FURNITURE/ FURNITURE KITS	7.6%
SEEDS, BULBS, PLANTS	28.2%	JEWELRY	6.2%
CRAFTS/ CRAFT KITS	27.9%	FUND RAISING CONTRIBUTION	3.8%
HOUSEWARES	26.8%	HEALTH FOODS	3.5%
CATALOGS	23.8%	INSURANCE	1.8%
CURTAINS	17.9%	HOME STUDY COURSES	0.9%
STATIONARY	16.5%	OTHER	8.8%
FOOD/CHEESE/FRUIT PACKAGES	16.2%	DON'T KNOW/ NO ANSWER	2.6%
RECORDS/TAPES	15.0%		

Source: "Better Homes and Gardens" Consumer Panel, 1984

PROJECTED PERCENT SALES INCREASES, 1982–1986

SEGMENT	PERCENT INCREASE
DRUG AND PROPRIETARY STORES	45%
MAIL ORDER HOUSES	43%
MENS & BOYS CLOTHING	41%
HOBBY, TOY AND GAME SHOPS	39%
CHILDREN'S & INFANTS' WEAR	34%
RETAIL INDUSTRY OVERALL	32%
AUTO PARTS AND SUPPLIES	30%
VARIETY STORES	29%
BUILDING MATERIALS	23%
GENERAL MERCHANDISE	21%
DEPARTMENT STORES	20%
CONSUMER ELECTRONIC STORES	18%
GROCERY STORES	14%
WOMEN'S READY-TO-WEAR	10%

Source: Dun & Bradstreet Corporation, 1984

ESTIMATED ANNUAL U.S. ADVERTISING EXPENDITURES 1977-1985
(IN MILLIONS OF DOLLARS)

	1977	1978	1979	1980	1981	1982	1983	1984	1985
NEWSPAPERS									
TOTAL	10,751	12,214	13,863	14,794	16,528	17,694	20,582	23,522	25,480
NATIONAL	1,472	1,541	1,770	1,963	2,259	2,452	2,734	3,081	3,300
LOCAL	9,279	10,673	12,093	12,831	14,269	15,242	17,848	20,441	22,180
MAGAZINES	2,162	2,597	2,932	3,149	3,533	3,710	4,233	4,932	5,180
FARM PUBLICATIONS	90	104	120	130	146	148	163	181	193
TELEVISION									
TOTAL	7,612	8,955	10,154	11,474	12,847	14,706	16,789	19,900	20,235
NETWORK	3,460	3,975	4,599	5,130	5,575	6,210	7,017	8,526	8,310
SPOT	2,204	2,607	2,873	3,319	3,805	4,510	5,096	5,773	6,264
CABLE (NATIONAL)	—	—	—	50	105	195	303	466	569
LOCAL	1,948	2,373	2,682	2,967	3,345	3,759	4,323	5,055	5,661
CABLE (LOCAL)	—	—	—	8	17	32	50	80	105
RADIO									
TOTAL	2,634	3,052	3,310	3,702	4,230	4,670	5,210	5,813	6,475
NETWORK	137	147	161	183	230	255	296	316	357
SPOT	546	620	665	779	879	923	1,038	1,197	1,323
LOCAL	1,951	2,285	2,484	2,740	3,121	3,492	3,876	4,300	4,795
DIRECT MAIL	5,164	5,987	6,653	7,596	8,944	10,319	11,795	13,800	15,600
BUSINESS PUBLICATIONS	1,221	1,400	1,575	1,674	1,841	1,876	1,990	2,270	2,384
OUTDOOR									
TOTAL	418	466	540	578	650	721	794	872	935
NATIONAL	290	307	355	364	419	465	512	562	600
LOCAL	128	159	185	214	231	256	282	310	335
MISCELLANEOUS									
TOTAL	7,388	8,555	9,633	10,453	11,711	12,736	14,294	16,530	21,531
NATIONAL	3,849	4,435	4,992	5,478	6,154	6,722	7,348	8,586	12,382
LOCAL	3,539	4,120	4,641	4,975	5,557	6,014	6,946	7,944	9,149
TOTAL									
NATIONAL	20,595	23,720	26,695	29,815	33,890	37,785	42,525	49,690	53,285
LOCAL	16,845	19,610	22,085	23,735	26,540	28,795	33,325	38,130	41,785
GRAND TOTAL	37,440	43,330	48,780	53,550	60,430	66,580	75,850	87,820	95,070

Source: Robert J. Coen, McCann-Erickson, Inc., 1985

ESTIMATED 1984–1985 U.S. AD VOLUME

	1984 ($ MILLIONS)	1985 ($ MILLIONS)	Percent Change
NATIONAL			
NEWSPAPERS	3,081	3,300	+ 7.1
MAGAZINES	4,932	5,180	+ 5.0
NETWORK TV	8,526	8,310	− 2.5
SPOT TV	5,773	6,264	+ 8.5
CABLE TV	466	569	+22.1
DIRECT MAIL	13,800	15,600	+13.0
OTHER NATIONAL MEDIA	13,112	14,062	+ 7.2
TOTAL NATIONAL ADVERTISING	49,690	53,285	+ 7.2
LOCAL			
NEWSPAPERS	20,441	22,180	+ 8.5
LOCAL TV	5,055	5,661	+12.0
CABLE TV	80	105	+31.3
OTHER LOCAL MEDIA	12,554	13,839	+10.2
TOTAL LOCAL ADVERTISING	38,130	41,785	+ 9.6
TOTAL ALL ADVERTISING	87,820	95,070	+ 8.3

MEDIA UNIT* COST TRENDS
(1967 = 100)

	1981	1982	1983	1984	1985**	1986**
NEWSPAPERS	279	308	336	366	395	423
MAGAZINES	201	219	237	256	276	291
NETWORK TV	329	365	394	445	476	505
SPOT TV	286	317	342	376	399	421
NETWORK RADIO	244	268	300	321	347	368
SPOT RADIO	215	232	248	273	289	305
OUTDOOR	303	330	363	396	428	456
DIRECT MAIL	263	286	290	282	302	314
COMPOSITE	270	297	318	342	367	389

*A unit in the various media listed includes a single black-and-white page for newspapers, a four-color ad for magazines, 30-second spots for network and spot TV, one-minute spots for network and spot radio, a 100 showing in outdoor (100 GRPs, which is the reach and frequency of x-amount of boards per day), and 25,000 pieces of direct mail.
**Estimated

Source: Robert J. Coen, McCann-Erickson, 1985

DIRECT RESPONSE ADVERTISING AGENCIES U.S. GROSS BILLINGS

	BILLINGS (IN MILLIONS) 1985	1984
AGENCIES REPORTING FEES AND COMMISSIONS ONLY		
WUNDERMAN, RICOTTA & KLINE	175.7	149.7
OGILVY & MATHER DIRECT	173.0	133.0
CHAPMAN/STONE & ADLER, INC.[1]	96.0	72.0
RAPP & COLLINS DIRECT RESPONSE GROUP[2]	83.5	57.6
GREY DIRECT INTERNATIONAL	81.8	56.8
KOBS & BRADY ADVERTISING, INC.	70.3	52.0
FCB DIRECT[2]	60.6	47.7
BARRY BLAU & PARTNERS	42.5	37.7
BBDO DIRECT, INC.	37.9	33.0
MARCOA DIRECT ADVERTISING, INC.	36.1	35.1
McCAFFREY & McCALL DIRECT MARKETING	35.0	25.0
LEBER KATZ PARTNERS DIRECT MARKETING	33.7	20.0
JWT DIRECT	30.6	21.6
SCALI, McCABE, SLOVES DIRECT	30.5	20.7
FLAIR DIRECT	28.7	18.0
CAMPBELL-EWALD COMPANY	27.0	NA
BOZELL, JACOBS, KENYON & ECKHARDT DIRECT	26.5	20.1
DFS DIRECT	25.8	11.9
SSC&B:VOS DIRECT, INC.	25.5	24.5
AYER DIRECT	25.0	21.4
THE DR GROUP, INC.	24.4	22.2
FAIRFAX ADVERTISING, INC.	24.2	23.0
McCANN DIRECT	24.1	20.0
KARL ROVE & COMPANY[2]	21.3	17.6
KETCHUM DIRECT	20.3	14.0
LAWRENCE BUTNER ADVERTISING, INC.	20.1	15.2
DIRECT INC.	20.0	32.0
MORE DIRECT	17.5	16.0
BROWN DIRECT	17.0	15.3
AC & R DIRECT	12.5	7.8
GRANT/JACOBY, INC.	12.0	8.6
CLARK DIRECT MARKETING	11.8	NA
KKB, INC.	10.5	9.5
MacDANTZ DIRECT, INC.	10.1	7.4
BLOOM & GELB	9.2	9.2
TAURUS MARKETING	9.0	8.0
CRAMER-KRASSELT/DIRECT	8.8	6.6
EVERGREEN ADVERTISING & MARKETING, INC.	8.4	4.9
WOL DIRECT[3]	7.6	7.6
MULDOON DIRECT, INC.	7.3	5.2
NELSON PANULLO JUTKINS DIRECT MARKETING	7.1	4.2
THE TOWNSEND AGENCY, INC.	6.8	5.7
THE RESPONSE COMMUNICATIONS GROUP, INC.	6.6	4.7
KEYE ADVERTISING	6.3	6.1
HERRING/NEWMAN DIRECT ADVERTISING	6.1	1.9
HEMMINGS, BIRKHOLM & GRIZZARD	5.8	NA
PETER VANE ADVERTISING	5.7	4.9
TRACY-LOCKE DIRECT/DENVER	5.3	3.1
J.W. PRENDERGAST & ASSOCIATES, INC.	5.2	5.2
MARKETING GROUP	5.1	NA
HAL LANGERMAN COMPANY	5.6	4.7
JLA DIRECT	3.8	NA
LEFTON DIRECT	3.7	NA
MARTIN A. LAVE MARKETING, INC.	3.6	2.1
PARSONS & KERN ADV, INC.	3.6	3.4
RONALD A. BERNSTEIN & ASSOC., INC.	3.3	2.5
LORTZ DIRECT MARKETING INC.	3.3	2.6
JACOBS & CLEVENGER, INC.	2.7	2.0
CREATIVE MARKETING ASSOCIATES	2.6	2.5
EGAN ADVERTISING, INC.	2.3	1.5
GERALD PATLIS ADVERTISING	2.1	2.9
CARMICHAEL-LYNCH, INC.	2.1	0.5
MALMO DIRECT	2.0	NA
CARGILL, WILSON, & ACREE DIRECT	1.7	0.2
RUSS LAPSO & ASSOCIATES, INC.	1.5	0.1
SAWYERDIRECT	1.3	NA
HENDERSON DIRECT	1.3	1.2
CENTRAL ADVERTISING AGENCY, INC.	0.2	1.1
DUFFORD MARKETING	0.9	0.7
AGENCIES REPORTING FEES AND COMMISSIONS PLUS INTERNAL PRODUCTION REVENUES		
THE DIRECT MARKETING GROUP, INC.	101.6	82.1
THE DIRECT MARKETING AGENCY, INC.	80.4	67.3
KRUPP/TAYLOR	53.2	42.3
DIRECT MAIL CORPORATION OF AMERICA	39.8	20.0
EPSILON	35.8	33.9
CUSTOMER DEVELOPMENT CORP.	35.4	NA
HUB MAIL ADVERTISING	34.1	28.0
COMPUTER MARKETING SERVICES, INC.	29.5	21.7
GSP MARKETING SERVICES	27.7	NA
MARKETING COMMUNICATIONS, INC.	13.0	13.2
FRANK/JAMES DIRECT MARKETING CO.	9.8	8.2
GRIZZARD ADVERTISING, INC.	9.3	8.1
MANUS SERVICES CORP.	8.6	10.0
WALTER LATHAM COMPANY	7.0	3.1
BRUCE W. EBERLE & ASSOC.	6.2	5.5
WEBB & COMPANY	5.1	NA
COMMUNIQUE, INC.	4.8	2.7
CREATIVE DIRECT MARKETING GROUP	1.2	NA

1. The 1984 figure represents Stone & Adler offices in NYC and Chicago and does not include Chapman Direct billings; however in 1984 Chapman Direct billings were reported to be $41.5 million. The 1985 figure represents the Stone & Adler office in Chicago and Chapman Direct billings.
2. Does not include internal production revenue.
3. The 1984 figure includes internal production revenue but the 1985 figure does not.

Note: This list represents only those agencies who responded to a request made in 1986 for full year U.S. 1984 and 1985 billings. All figures were supplied by the individual agencies, who were asked to include capitalized media commissions, material and services fees and agency fees plus revenue derived from direct mail internal production activities where the agency provided the creative services.

Source: DMA Research Department, 1986

A MAILER'S NEED FOR LIST INFORMATION DIFFERS FROM THE BROKER'S NEED

These criteria are the ones most often mentioned as being extremely or very important to mailers:

Status of names	82%
Source of names	81%
Type of product or service	75%
Selectivity	70%
Reputation of list owner/list manager	60%

Identified as the most important criteria to mailing list brokers are:

Source of names	91%
Status of names	89%
Selectivity	86%
Current counts	83%
Type of product or service	77%

NUMBER OF MAILING LISTS TESTED IN LAST 12 MONTHS (AMONG MAILERS)

NONE	6%
1– 5	14
6–10	11
11–15	4
16–20	8
21–25	8
26–30	6
31–35	1
36–40	4
41–45	—
46–50	3
51–100	14
MORE THAN 100	21
TOTAL	100%

NUMBER OF RESPONDENTS: 73
MEDIAN: 26

MONTHS OF YEAR WHEN MAILING LISTS ARE TESTED (AMONG MAILERS)

EVERY MONTH OF THE YEAR	44%
JANUARY	15
FEBRUARY	14
MARCH	28
APRIL	19
MAY	8
JUNE	12
JULY	12
AUGUST	14
SEPTEMBER	23
OCTOBER	22
NOVEMBER	15
DECEMBER	11
NO RESPONSE	7
TOTAL	244%*

NUMBER OF RESPONDENTS: 73
*TOTAL EXCEEDS 100% DUE TO MULTIPLE RESPONSES.

Source: Standard Rate and Data Service, Inc., Direct Media, Inc. 1984

IMPORTANT CRITERIA WHEN TESTING MAILING LISTS (AMONG MAILERS)

	EXTREMELY IMPORTANT	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	NOT IMPORTANT AT ALL	NO RESPONSE	TOTAL
BACK-END PERFORMANCE OBTAINED BY LIST OWNER	16	30	26	12	14	2	100%
COST PER THOUSAND	14	29	44	4	9	—	100%
CURRENT COUNTS	16	32	37	8	7	—	100%
CUSTOMER CREDIT-WORTHINESS	11	20	33	18	18	—	100%
DELIVERABILITY GUARANTEE	15	30	27	18	10	—	100%
DEMOGRAPHICS/ PSYCHOGRAPHICS	19	36	27	12	6	—	100%
LETTERSHOP AVAILABILITY	14	15	14	24	33	—	100%
MAIL DATE CLEARANCE ASSURANCES	15	33	32	11	8	1	100%
MAILERS WHO HAVE SUCCESSFULLY USED LIST IN THE PAST	19	26	39	8	8	—	100%
NIXIE RATE	1	29	32	16	21	1	100%
PREMIUMS OR INITIAL TEST DISCOUNTS	—	10	34	26	30	—	100%
RECENCY/FREQUENCY/ MONETARY FACTORS	10	49	29	4	8	—	100%
REPUTATION OF LIST OWNER/LIST MANAGER	20	40	29	4	7	—	100%
SELECTIVITY	29	41	23	3	4	—	100%
SOURCE OF NAMES (I.E., VEHICLE WHICH GENERATED THE DIRECT RESPONSE)	38	43	12	1	6	—	100%
STATUS OF NAMES (BUYERS, INQUIRERS, TRIALS)	33	49	11	1	4	2	100%
TYPE OF PRODUCT OR SERVICE PURCHASED	30	45	21	1	3	—	100%

NUMBER OF RESPONDENTS: 73

Source: Standard Rate and Data Service, Inc., Direct Media, Inc., 1984

DMA MAILING LIST USAGE SURVEY OVERVIEW

The latest List Usage Survey, conducted by DMA's List Council, confirms the continued growth and strength of direct marketing as reflected in list usage. Increases are strong across all business categories.

This survey report consists of replies from 293 companies and carries comparisons for 1984 and 1983. Outlook for the full year of 1985 is included.

The replies were reviewed and compiled by HAI Association Services to protect the confidentiality of individual company data.

Responses were summarized first by major business categories and also by pieces mailed. This will permit a more detailed analysis and evaluation of the results, and, allow you to relate the data more closely to your own activities. In all instances, the data represents the number of companies replying.

SUMMARY OF ALL REPLIES BY BUSINESS CATEGORY

	CONSUMER CATALOGS PRODUCTS	BUSINESS CATALOGS PRODUCTS	CONSUMER PUBLICATIONS	BUSINESS PUBLICATIONS	CLUBS & CONTINUITIES	NON-PROFIT/ FUND RAISING	INSURANCE AND FINANCIAL	OTHER	ALL COMPANIES
# OF PIECES MAILED									
UNDER 3MM	50	25	8	8	3	5	20	17	136
3-10 MM	19	11	7	10	3	3	14	10	77
11-20MM	17	0	3	4	0	4	4	4	36
Over 20MM	17	5	3	3	5	4	5	2	44
# OF PIECES MAILED									
INCREASED	77	34	14	14	7	9	37	26	218
DECREASED	11	3	2	4	0	2	3	2	27
UNCHANGED	13	3	5	7	4	5	3	5	45
PERCENT CHANGE	+ –	+ –	+ –	+ –	+ –	+ –	+ –	+ –	+ –
UNDER 5%	8 2	1 0	1 2	1 0	1 0	1 0	0 0	3 0	16 4
5-10	18 1	9 1	5 0	9 3	2 0	2 1	10 1	11 2	66 9
11-20	18 7	11 2	2 0	3 1	1 0	4 1	11 1	5 0	55 12
21-30	11 1	3 0	1 0	1 0	1 0	1 0	4 0	2 0	24 1
OVER 30	22 0	10 0	5 0	0 0	2 0	1 0	12 1	5 0	57 1
OUTSIDE NAMES USAGE									
INCREASED	65	32	12	11	6	10	31	16	183
DECREASED	10	5	1	2	0	1	1	4	24
UNCHANGED	24	3	8	12	5	4	9	12	77
PERCENT CHANGE	+ –	+ –	+ –	+ –	+ –	+ –	+ –	+ –	+ –
UNDER 5%	9 1	3 0	0 0	4 0	1 0	0 1	0 0	2 3	19 5
5-10	20 1	10 1	2 0	5 0	0 0	3 0	10 0	3 1	53 3
11-20	13 4	8 3	2 0	0 2	2 0	3 0	9 0	5 0	42 9
21-30	6 3	3 0	1 0	1 0	2 0	4 0	1 0	1 0	19 3
OVER 30	17 1	8 1	7 1	1 0	1 0	0 0	11 1	5 0	50 4
HOUSE NAMES USAGE									
INCREASED	72	32	10	14	6	11	23	24	192
DECREASED	9	0	1	4	1	1	2	0	18
UNCHANGED	20	8	10	7	4	4	17	9	79
UP-FRONT RESPONSE									
INCREASED	56	20	6	11	2	8	20	16	148
DECREASED	21	2	9	3	2	4	7	2	50
UNCHANGED	22	8	6	9	7	2	16	14	84
PERCENT CHANGE	+ –	+ –	+ –	+ –	+ –	+ –	+ –	+ –	+ –
UNDER 5%	15 5	4 1	3 4	3 0	1 1	2 2	3 0	5 0	36 13
5-15	30 12	13 1	1 5	6 2	0 1	6 2	11 5	6 1	73 29
16-30	7 2	8 0	1 0	1 1	1 0	0 0	2 1	1 1	21 5
OVER 30	4 2	4 0	1 0	1 0	0 0	0 0	4 1	4 0	18 3
BACK-END PERFORMANCE									
INCREASED	43	22	6	5	2	6	12	8	104
DECREASED	9	1	5	6	1	2	5	2	31
UNCHANGED	42	15	10	12	8	4	26	19	136
PERCENT CHANGE	+ –	+ –	+ –	+ –	+ –	+ –	+ –	+ –	+ –
UNDER 10%	27 3	11 0	4 4	3 3	1 1	2 2	5 0	4 2	57 15
10-20	9 3	10 0	2 1	1 3	0 0	4 0	6 4	1 0	33 11
OVER 20	7 3	1 1	0 0	1 0	1 0	0 0	1 1	3 0	14 5
'85 MARKET OUTLOOK									
BETTER THAN 1984	59	21	7	8	6	8	28	17	154
SAME AS 1984	33	16	10	11	4	4	10	9	97
WORSE THAN 1984	7	3	4	6	1	4	5	6	36
1985 PIECES MAILED									
WILL INCREASE	55	27	7	7	5	8	33	24	166
WILL BE THE SAME	33	9	7	16	6	6	7	6	90
WILL DECREASE	13	4	7	2	0	2	3	2	33
LIST TECHNIQUES USED TO IMPROVE UPFRONT & BACKEND RESULTS									
MERGE/PURGE	90	33	20	15	7	15	37	25	242
DATA BASE	55	20	8	11	6	12	27	17	156
SWEEPSTAKES	8	3	7	0	5	3	7	6	39
GEO-SEGMENTATION	37	9	9	5	8	8	26	13	115
DEMO-SEGMENTATION	44	11	9	8	9	9	30	17	137
OUTSIDE CONSULTING	32	9	4	2	3	6	15	12	83
BAD DEBT PRESCREEN	26	7	3	3	4	0	7	3	53
OTHER	7	1	1	1	0	1	7	3	21
LIST RENTAL AVAILABILITY									
NOT AVAILABLE	21	17	1	5	3	5	30	21	103
RENTAL ONLY	13	9	1	5	0	0	5	3	36
EXCHANGE ONLY	3	1	1	0	0	0	2	3	10
RENT & EXCHANGE	65	11	17	13	7	11	3	6	133
LIST RENTAL INCOME '84									
GREATER THAN 1983	46	13	11	14	4	8	5	6	109
SAME AS 1983	21	6	6	2	3	1	6	4	49
LESS THAN 1983	9	1	1	1	0	2	2	3	19
DO YOU ALLOW RENTAL OF YOUR LISTS FOR TELEMARKETING PURPOSES									
YES	24	16	10	6	2	4	22	10	94
NO	72	21	10	16	8	12	19	21	179

Source: DMA List Council, 1985. Compiled by HAI Association Services

SIZE OF THE MARKET
1984 COMPARED TO 1980

	IN BILLIONS OF PIECES		IN MILLIONS OF DOLLARS		AVERAGE PRICE PER/M	
	1980	1984	1980	1984	1980	1984
BUSINESS COMPILED NAMES	(1.5)	2.5	(45)	88	($30)	$35
CONSUMER COMPILED NAMES	(2.8)	6.3	(55)	158	($20)	$25
OCCUPANT OR RESIDENT ADDRESSES	(5.0)	9.9	(25)	59	($ 5)	$ 6
RESPONSE NAMES	(4.0)	6.0	(140)	240	($35)	$40
	13.3	24.7	265	545	$20	$22

Source: Arnold Fishman, Marketing Logistics, 1985

SEASONALITY STUDY/UPDATE #10—APRIL 1986
PREPARED BY THE KLEID COMPANY, INC.

Undoubtedly, the "when to mail" decision is based on a number of fundamental business factors which vary from company to company. However, if you observe and review seasonal patterns on a continuing and consistent basis, it will provide an insight into the effect of seasonality upon response. In forecasting response, any uncertainty which can be reasonably measured will help in the sequential process of forecasting. If you must mail in a period that is not the "best", then this information can be integrated into the forecasted mail plan. In other words, you can project a lower response. This will improve the "management" of the plan.

	FIVE YEAR AVERAGE THROUGH: 1984–85		1985–86	
	TOP MONTH	#2 MONTH	TOP MONTH	#2 MONTH
BUSINESS & FINANCE	DECEMBER	JANUARY	DECEMBER	JANUARY
CULTURAL READING	DECEMBER	JUNE	DECEMBER	JUNE
GENERAL READING	DECEMBER	JUNE	DECEMBER	JULY
SELF-IMPROVEMENT	DECEMBER	JANUARY	DECEMBER	SEPT./JAN.
HOME INTEREST	DECEMBER	JANUARY	JULY	DECEMBER
PARENTS & CHILDREN	JULY	JANUARY	JULY	JANUARY
HOBBIES/RELATED SUBJECTS	JULY	DECEMBER	DECEMBER	JULY
ENTERTAINMENT	DECEMBER	JULY/JAN.	DECEMBER	JULY
EDUCATIONAL/TECHNICAL/PROF.	DECEMBER	JUNE	APRIL	JUNE
FUND RAISING	SEPTEMBER	JANUARY	FEBRUARY	SEPTEMBER

Source: The Kleid Company, Inc., 1986

SEASONALITY STUDY
CATEGORY: BUSINESS/FINANCE
MONTHLY % OF TOTAL MAILINGS

	1981–82	1982–83	1983–84	1984–85	1985–86	5-YEAR AVERAGE
MARCH	6.2	11.2	8.1	4.7	6.4	7.3
APRIL	8.7	4.6	5.7	7.5	7.0	6.7
MAY	8.4	6.0	6.3	4.8	6.2	6.3
JUNE	5.9	7.6	9.1	11.4	11.2	9.1
JULY	9.4	7.9	9.1	6.7	5.4	7.7
AUGUST	6.9	6.3	4.5	5.8	6.5	6.0
SEPTEMBER	8.5	9.3	7.4	6.5	7.2	7.8
OCTOBER	8.0	7.1	10.6	9.5	8.4	8.7
NOVEMBER	5.8	4.2	4.7	6.7	6.3	5.5
DECEMBER	14.2	15.6	14.7	18.3	17.9	16.2
JANUARY	11.0	13.1	13.8	8.6	11.2	11.5
FEBRUARY	7.0	7.1	6.0	9.5	6.3	7.2
TOTAL:	100%	100%	100%	100%	100%	100%

December and June still maintain the strong performance of last year. January recovered from last year's slide while February declined. These three months account for over 40% of the total volume.

SEASONALITY STUDY
CATEGORY: CULTURAL READING
MONTHLY % OF TOTAL MAILINGS

	1981–82	1982–83	1983–84	1984–85	1985–86	5-YEAR AVERAGE
MARCH	4.0	6.4	4.1	4.2	5.8	4.9
APRIL	2.1	1.6	6.8	1.5	1.3	2.7
MAY	1.6	.4	2.2	1.8	1.5	1.5
JUNE	14.5	15.6	14.6	13.6	13.4	14.3
JULY	8.6	6.6	7.2	9.0	9.8	8.2
AUGUST	3.4	2.9	4.4	4.2	9.2	4.8
SEPTEMBER	13.4	10.4	10.1	10.5	6.4	10.2
OCTOBER	7.8	11.3	7.0	7.1	8.8	8.4
NOVEMBER	4.6	2.1	3.5	7.0	6.6	4.8
DECEMBER	21.1	33.5	25.9	22.6	27.0	26.0
JANUARY	9.4	6.4	10.7	10.5	7.5	8.9
FEBRUARY	9.5	2.8	3.5	8.0	2.7	5.3
TOTAL:	100%	100%	100%	100%	100%	100%

December is the best month by a 2 to 1 margin over second-place June. September showed a sharp downturn while the opposite is true of August. July continues slowly on an upward trend while January and February remain erratic.

Source: The Kleid Company, Inc., 1986

SEASONALITY STUDY
CATEGORY: GENERAL READING
MONTHLY % OF TOTAL MAILINGS

	1981–82	1982–83	1983–84	1984–85	1985–86	5-YEAR AVERAGE
MARCH	3.5	11.4	10.1	4.8	8.4	7.7
APRIL	1.5	2.7	3.6	7.1	1.2	3.2
MAY	3.5	8.2	5.9	10.1	7.4	7.0
JUNE	3.1	18.2	11.3	16.0	15.4	12.8
JULY	26.0	8.6	13.3	12.3	13.9	14.8
AUGUST	2.4	3.5	2.8	2.3	5.1	3.2
SEPTEMBER	11.9	7.6	11.3	8.8	11.4	10.2
OCTOBER	0.1	0.9	3.0	1.7	3.4	1.8
NOVEMBER	1.9	0.1	1.9	2.0	2.8	1.8
DECEMBER	22.6	21.4	25.8	20.4	22.8	22.6
JANUARY	18.8	12.5	7.0	12.0	6.2	11.3
FEBRUARY	4.7	4.9	4.0	2.5	2.0	3.6
TOTAL:	100%	100%	100%	100%	100%	100%

December is still the leader. June, July and September are still strong while January takes a nose dive.

SEASONALITY STUDY
CATEGORY: SELF-IMPROVEMENT
MONTHLY % OF TOTAL MAILINGS

	1981–82	1982–83	1983–84	1984–85	1985–86	5-YEAR AVERAGE
MARCH	2.2	5.8	6.7	4.8	6.1	5.1
APRIL	2.4	3.1	5.7	8.2	8.5	5.6
MAY	1.5	2.2	5.1	1.8	5.9	3.3
JUNE	5.6	6.8	10.8	14.2	4.9	8.5
JULY	7.3	5.1	2.6	14.9	8.1	7.6
AUGUST	9.0	10.8	11.0	3.6	3.6	7.6
SEPTEMBER	15.9	14.2	11.6	11.2	9.7	12.5
OCTOBER	1.3	7.3	7.0	6.3	6.1	5.6
NOVEMBER	1.6	2.9	1.1	1.4	1.4	1.7
DECEMBER	30.8	16.3	14.9	19.5	32.7	22.8
JANUARY	13.1	14.3	14.0	10.1	11.1	12.5
FEBRUARY	9.3	11.2	9.5	4.0	1.9	7.2
TOTAL:	100%	100%	100%	100%	100%	100%

December is undoubtedly the leader, with an impressive increase in volume over last year. January remains constant for the #2 position. Note the decrease in June, July, September and February.

Source: The Kleid Company, Inc., 1986

SEASONALITY STUDY
CATEGORY: HOME INTEREST
MONTHLY % OF TOTAL MAILINGS

	1981–82	1982–83	1983–84	1984–85	1985–86	5-YEAR AVERAGE
MARCH	2.6	2.0	4.8	7.9	5.8	4.6
APRIL	5.3	4.1	3.3	6.0	7.3	5.2
MAY	2.4	1.4	2.8	1.8	1.5	2.0
JUNE	8.9	13.2	10.0	11.3	10.8	10.8
JULY	12.4	9.9	15.2	20.0	21.1	15.7
AUGUST	8.9	9.2	9.3	6.3	6.4	8.0
SEPTEMBER	9.7	7.0	12.8	6.4	5.9	8.4
OCTOBER	8.9	9.8	10.2	12.2	6.2	9.5
NOVEMBER	0.9	1.9	1.1	3.3	3.7	2.2
DECEMBER	7.0	20.4	16.0	11.7	14.6	13.9
JANUARY	14.8	15.3	10.3	10.0	10.7	12.2
FEBRUARY	18.2	5.8	4.2	3.1	6.0	7.5
TOTAL:	100%	100%	100%	100%	100%	100%

On a fairly consistent basis, July has kept the #1 spot. December is again claiming #2 position.

SEASONALITY STUDY
CATEGORY: PARENTS AND CHILDREN
MONTHLY % OF TOTAL MAILINGS

	1981–82	1982–83	1983–84	1984–85	1985–86	5-YEAR AVERAGE
MARCH	2.5	3.2	2.4	3.0	4.2	3.1
APRIL	1.4	0.9	1.0	.8	3.1	1.5
MAY	8.4	8.5	2.2	2.7	2.4	4.8
JUNE	3.3	3.3	5.7	8.6	5.5	5.3
JULY	23.2	18.6	27.1	20.8	18.5	21.6
AUGUST	12.3	11.3	10.5	12.1	13.9	12.0
SEPTEMBER	1.7	5.0	5.7	7.9	5.9	5.2
OCTOBER	2.9	1.2	1.0	1.6	7.1	2.8
NOVEMBER	0.4	0.5	2.5	2.6	2.8	1.8
DECEMBER	13.6	17.9	11.7	12.2	10.3	13.1
JANUARY	18.9	15.2	21.4	14.2	15.0	16.9
FEBRUARY	11.4	14.4	8.8	13.5	11.3	11.9
TOTAL:	100%	100%	100%	100%	100%	100%

July, August, December, January and February account for 67% of the total volume which is very consistent with 5-year averages (75.5%).

Source: The Kleid Company, Inc., 1986

SEASONALITY STUDY
CATEGORY: HOBBIES — RELATED SUBJECTS
MONTHLY % OF TOTAL MAILINGS

	1981–82	1982–83	1983–84	1984–85	1985–86	5-YEAR AVERAGE
MARCH	3.8	2.3	3.9	8.5	6.3	5.0
APRIL	3.2	5.0	2.2	1.6	3.6	3.1
MAY	3.8	3.0	2.2	2.4	3.4	3.0
JUNE	6.5	4.2	5.7	12.3	16.8	9.1
JULY	22.9	17.3	20.2	16.1	16.3	18.5
AUGUST	7.2	8.3	8.9	10.5	5.6	8.1
SEPTEMBER	9.0	11.7	5.1	5.6	6.2	7.5
OCTOBER	2.5	2.8	8.6	5.3	5.0	4.8
NOVEMBER	0.8	2.7	1.0	.5	1.5	1.3
DECEMBER	17.4	20.6	23.9	20.1	18.8	20.2
JANUARY	15.5	15.2	12.0	8.8	7.6	11.8
FEBRUARY	7.4	6.9	6.3	8.3	8.9	7.6
TOTAL:	100%	100%	100%	100%	100%	100%

December barely maintains the # 1 spot, while June climbs to an all-time high as #2. July remains consistent. These three months account for 52% of the total volume. January continues its 5 year slide.

SEASONALITY STUDY
CATEGORY: ENTERTAINMENT
MONTHLY % OF TOTAL MAILINGS

	1981–82	1982–83	1983–84	1984–85	1985–86	5-YEAR AVERAGE
MARCH	7.1	2.7	3.2	9.3	8.4	6.1
APRIL	5.1	3.2	4.1	3.1	5.9	4.3
MAY	2.3	3.1	3.9	5.0	1.7	3.2
JUNE	4.5	8.9	4.8	7.8	4.1	6.0
JULY	17.5	13.1	10.1	9.8	12.0	12.5
AUGUST	13.8	7.3	8.2	8.2	8.4	9.2
SEPTEMBER	12.0	11.0	9.9	8.3	14.0	11.0
OCTOBER	8.4	8.9	10.1	6.9	4.6	7.8
NOVEMBER	5.0	2.2	6.0	1.7	2.7	3.5
DECEMBER	8.7	17.3	23.7	21.6	14.4	17.2
JANUARY	7.4	16.6	12.5	9.8	13.5	12.0
FEBRUARY	8.2	5.7	3.5	8.5	10.3	7.2
TOTAL:	100%	100%	100%	100%	100%	100%

Note the sharp drop in December. July, September, January and February appear to be gaining after a downtrend in previous years.

Source: The Kleid Company, Inc. 1986

SEASONALITY STUDY
CATEGORY: EDUCATIONAL, TECHNICAL, PROFESSIONAL
MONTHLY % OF TOTAL MAILINGS

	1981–82	1982–83	1983–84	1984–85	1985–86	5-YEAR AVERAGE
MARCH	4.4	8.2	6.6	8.5	6.4	6.8
APRIL	8.4	6.1	3.9	13.5	40.9	14.5
MAY	1.1	3.0	5.6	8.1	3.8	4.3
JUNE	33.2	9.5	3.5	15.9	5.6	13.5
JULY	9.9	1.7	9.4	5.6	3.2	6.0
AUGUST	3.6	8.7	11.4	4.5	6.3	6.9
SEPTEMBER	4.5	8.5	10.9	7.8	8.9	8.1
OCTOBER	9.0	6.4	10.7	8.5	3.7	7.7
NOVEMBER	4.9	9.8	4.0	5.5	4.2	5.7
DECEMBER	10.5	9.9	14.6	15.0	9.9	12.0
JANUARY	5.3	19.6	12.9	3.3	4.3	9.1
FEBRUARY	5.2	8.6	6.5	3.8	2.8	5.4
TOTAL	100%	100%	100%	100%	100%	100%

Once again April tripled the previous year's share to the highest monthly volume % of any category in the last five years. Note the substantial drop in June and December.

SEASONALITY STUDY
CATEGORY: FUND RAISING
MONTHLY % OF TOTAL MAILINGS

	1981–82	1982–83	1983–84	1984–85	1985–86	5-YEAR AVERAGE
MARCH	6.3	10.9	5.9	6.3	10.5	8.0
APRIL	6.6	5.5	5.5	9.2	4.9	6.3
MAY	5.4	6.0	3.6	5.6	5.1	5.1
JUNE	1.7	4.2	6.9	9.1	2.5	4.9
JULY	7.1	5.9	1.6	2.7	7.3	4.9
AUGUST	11.3	6.8	9.4	10.0	7.9	9.1
SEPTEMBER	10.6	13.3	8.3	12.7	13.0	11.6
OCTOBER	11.5	8.9	13.2	11.5	8.8	10.8
NOVEMBER	13.6	9.0	12.0	9.9	10.5	11.0
DECEMBER	6.6	10.8	14.0	4.9	6.7	8.6
JANUARY	6.4	6.4	5.6	8.2	5.3	6.4
FEBRUARY	12.9	12.3	14.0	9.9	17.5	13.3
TOTAL	100%	100%	100%	100%	100%	100%

February emerges as the best month with a new 5-year high. September and November also continue to show some strength.

Source: The Kleid Company, Inc. 1986

METHOD OF PAYMENT FOR MAIL ORDER ITEMS

SENT CHECK OR MONEY ORDER	86.2
VISA	30.3
MASTERCARD	20.3
CHARGE CARD	12.6
AMERICAN EXPRESS	6.8
OIL COMPANY (CHARGE CARD)	4.7
CARTE BLANCHE	—
DINERS CLUB	—
OTHER	2.4
DON'T KNOW/NO ANSWER	1.5

PREFERRED METHOD OF RESPONSE WHEN ORDERING MAIL ORDER PRODUCTS OR INFORMATION

TEAR-OUT-AND-RETURN CARD	47.3
RETURN POSTAGE-PAID ENVELOPE	30.6
TOLL-FREE 800 TELEPHONE NUMBER	24.8
CUT-OUT-COUPON FOR YOUR NAME AND ADDRESS	7.6
OTHER	—
DON'T KNOW/NO ANSWER	4.3

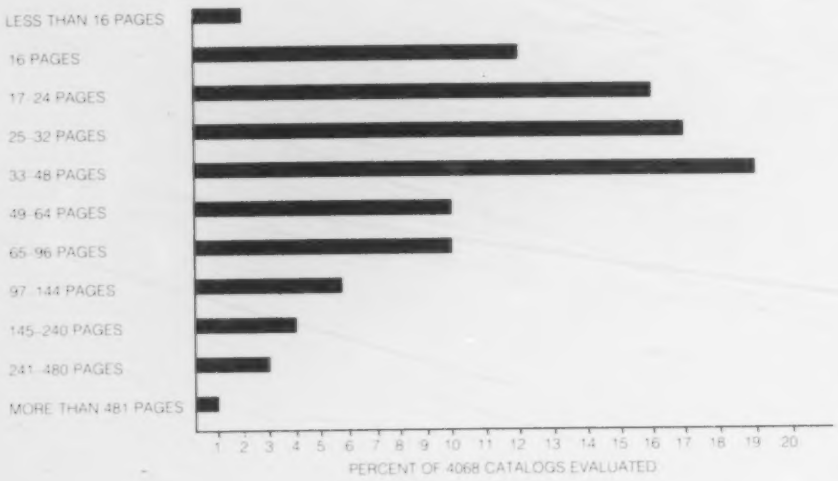
APPROXIMATE TOTAL AMOUNT SPENT FOR MAIL ORDER PURCHASES

LESS THAN $10.00	0.9%
$10.00–$19.99	4.7%
$20.00–$34.99	7.4%
$35.00–$49.99	6.2%
$50.00–$99.99	21.8%
$100.00–$199.99	27.4%
$200.00–$499.99	18.2%
$500.00 OR MORE	11.8%
DON'T KNOW/NO ANSWER	1.8%

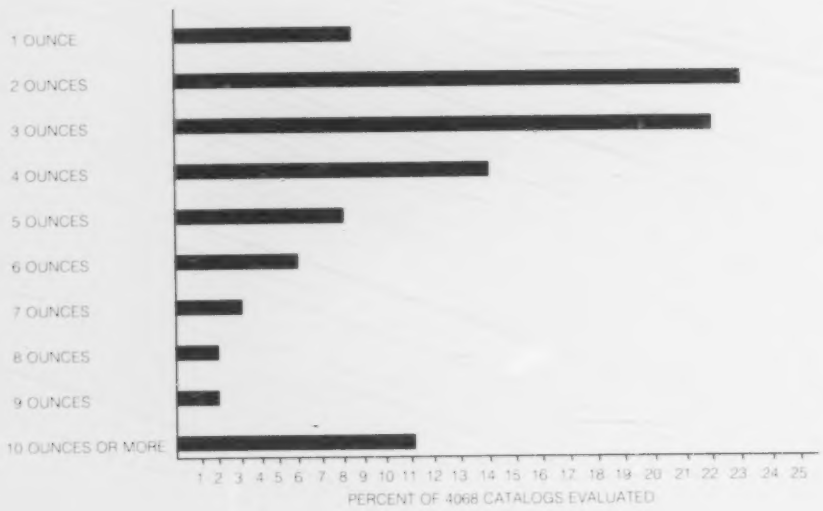
Source: "Better Homes and Gardens" Consumer Panel, 1984

The following three charts are based on quantitative information obtained through mail and telephone surveys and also from analyses of over 4,000 actual catalogs gathered and retained by Strategic Futures, Inc., a New York-based consulting firm.

CATALOG TOTAL PAGING

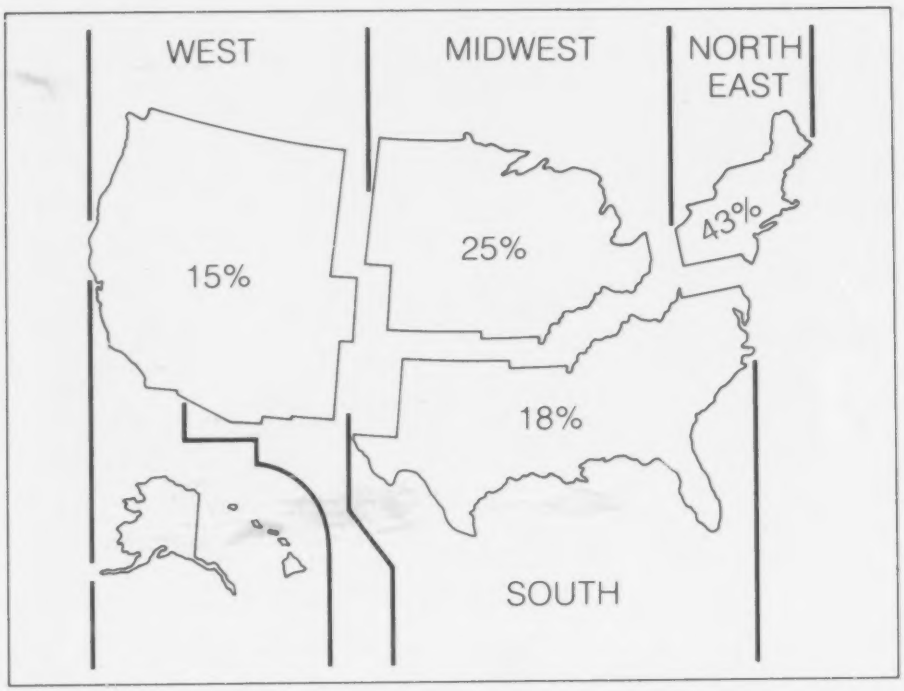


WEIGHT PER CATALOG


1 OUNCE
2 OUNCES
3 OUNCES
4 OUNCES
5 OUNCES
6 OUNCES
7 OUNCES
8 OUNCES
9 OUNCES
10 OUNCES OR MORE
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25
PERCENT OF 4068 CATALOGS EVALUATED

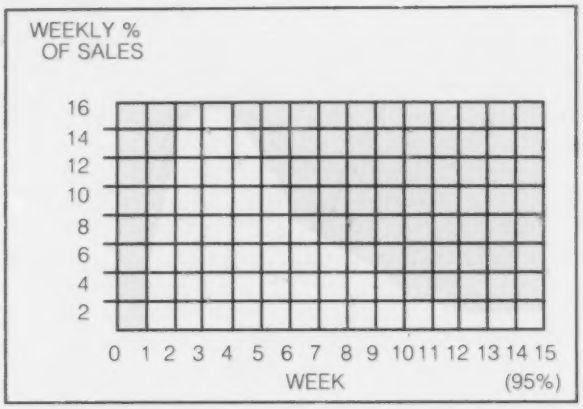
Source: Strategic Futures Inc., 1985

LOCATION OF CATALOG COMPANIES
(PERCENTAGE AMONG 4065 CATALOGS EVALUATED)



Source: Strategic Futures, Inc., 1985

TYPICAL CATALOG RESPONSE CURVE



Developing response curves, which indicate the percent of sales for each week of the catalog response period, can be an effective way to gauge how much inventory is required for any given product. Often, the first week's response can give a reliable indication of final sales, especially for hot-selling items that will need to be reordered immediately.

Source: Fenvessy and Schwab, 1985

INCREASED PROFIT BASED ON SALES/M

INCREASE IN CATALOG PAGES	32-PAGE SALES OF $1,000/M	32-PAGE SALES OF $3,000/M
32 TO 40	$27.75	$165.25
40 TO 48	20.88	144.63
48 TO 56	0.67	114.06
56 TO 64	– 3.38	101.94
64 TO 72		92.02
72 TO 80		83.74
80 TO 88		76.88
88 TO 96		69.56
96 TO 104		65.31
104 TO 112		60.62
112 TO 120		55.64
120 TO 128		52.74
TOTAL	$48.63*	$1,082.39

*TOTAL PROFIT FOR INCREASING CATALOG TO 48 PAGES

COMPARING PROFITS PER THOUSAND CATALOGS SHOWS THAT, FOR A 32-PAGE CATALOG WITH SALES PER THOUSAND OF $1,000, THE TOTAL PROFIT FOR INCREASING THE SIZE TO 48 PAGES IS $48.63. AT THAT POINT, AN INCREASE IN SIZE CEASES TO BE PROFITABLE. AT SALES PER THOUSAND OF $3,000, HOWEVER, THAT 32-PAGE CATALOG CAN INCREASE TO 128 PAGES AND STILL BE PROFITABLE. THIS TABLE ASSUMES A CONTRIBUTION TO PROFIT AND OVERHEAD OF 55 PERCENT AFTER DEDUCTING MERCHANDISE AND VARIABLE OPERATING COSTS AND THAT SALES INCREASE BY 1/2 THE PERCENT INCREASE IN THE NUMBER OF PAGES.

Source: Lawson Traphagen Hill, 1985

INCREMENTAL PROFIT

INCREASE IN CATALOG PAGES	SALES (S) AT 32 PAGES (V) C AT 32 PAGES	1 $2,000/M 45% $41/M	2 $4,000/M 45% $41/M	3 $2,000/M 35% $41/M	4 $2,000/M 60% $41/M	5 $2,000/M 45% $31/M
32 TO 40	$1,125,000	$40,250	$109,000	$57,750	$21,500	$45,250
40 TO 48	1,237,500	33,375	95,250	44,625	16,500	38,375
48 TO 56	1,340,583	20,696	77,392	31,004	5,234	25,696
56 TO 64	1,436,300	16,052	69,282	25,516	1,856	21,052
64 TO 72	1,526,069	12,812	62,742	21,687	−500	17,812
72 TO 80	1,610,766	10,046	57,163	18,419		15,046
80 TO 88	1,691,304	7,780	52,588	15,740		12,780
88 TO 96	1,768,089	5,370	47,705	12,891		10,370
96 TO 104	1,841,819	3,960	44,856	11,225		8,960
104 TO 112	1,912,728	2,417	41,742	9,402		7,417
112 TO 120	1,981,013	1,080	39,045	7,823		6,080
120 TO 128	2,046,981	−185	36,491	6,326		4,815

Column 1 shows the additional profit (P) for adding eight pages, when sales increase by 1/2 of the percent of the number of increased pages, when the sales/M are $2,000, when merchandise and variable operating costs (V) total 45 percent, and the additional catalog cost (C) is $41/M at 32 pages. The other columns are the same as Column 1, with the following exceptions: In Column 2, sales (S) equal $4,000/M at 32 pages. In Column 3, merchandise and variable operating costs (V) total 35 percent. In Column 4, V equals 60 percent. In Column 5, additional catalog costs are $31/M at 32 pages.

Given the conditions of our example, maximum profit occurs when the catalog reaches 120 pages. Beyond 120 pages, profit diminishes with an increase in the size of the catalog.

Source: Lawson Traphagen Hill, 1985

PROBABILITY OF COMPLETE ORDER*

NO. OF UNITS PER ORDER	PERCENT OF ORDERS	PERCENT OF ORDER WITHOUT BACKORDER	PROBABILITY OF COMPLETE ORDER
1	30	75	.225
2	25	56	.141
3	20	42	.084
4	15	32	.047
5	10	24	.024
	100		.521

*WITH A 75 PERCENT INITIAL FULFILLMENT RATE

According to the table, a catalog company that has an initial fulfillment rate of 75 percent, with order size distributed as shown, will send complete shipments to barely more than half of its customers (52 percent). Lower initial fulfillment rates will mean even more dissatisfied customers.

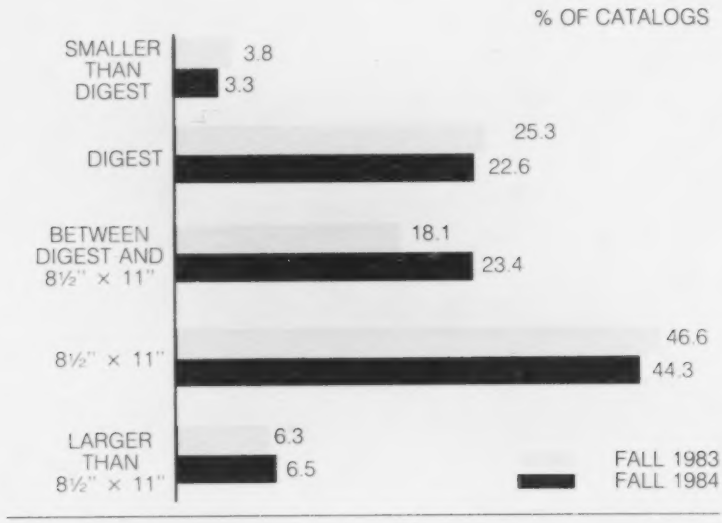
Source: Fenvessy and Schwab, 1985

CatalogSCAN

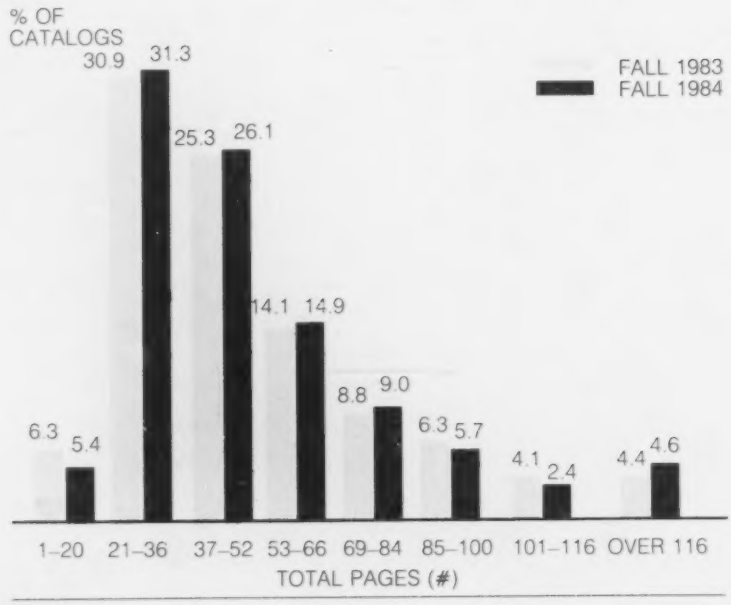
CatalogSCAN is a detailed historical database of more than 300 different consumer and business-to-business specialty catalogs. Developed by Kestnbaum and Company, CatalogSCAN analyzes at least 25% of the pages of each catalog by merchandise category and price.

The following charts have been derived from this database.

PAGE SIZE



NUMBER OF PAGES



Source: Kestnbaum & Company, 1985
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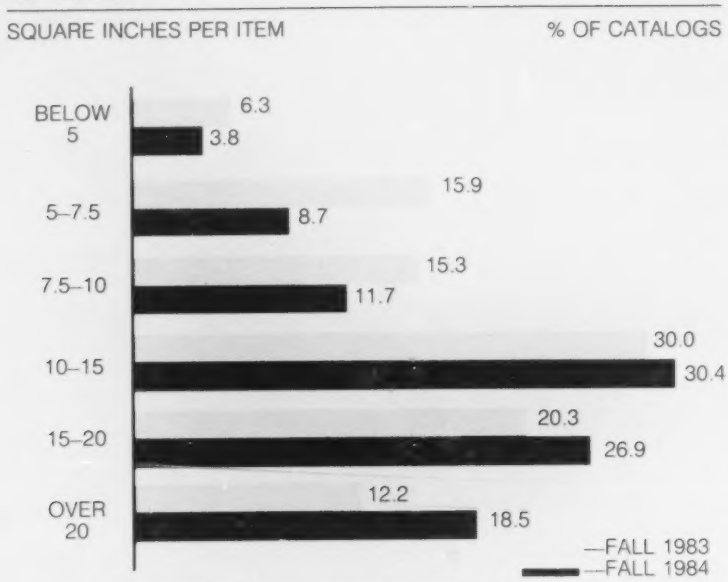
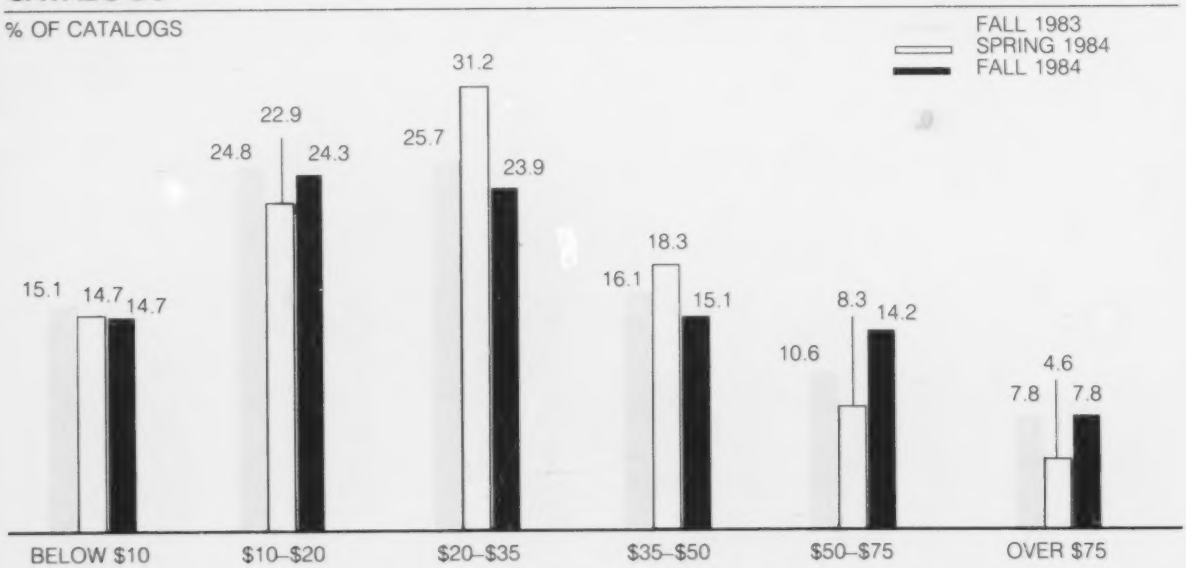
SQUARE INCHES PER ITEM*



*CATALOGSCAN™ DATA FROM 320 FALL 1983 AND 368 FALL 1984 CONSUMER CATALOGS

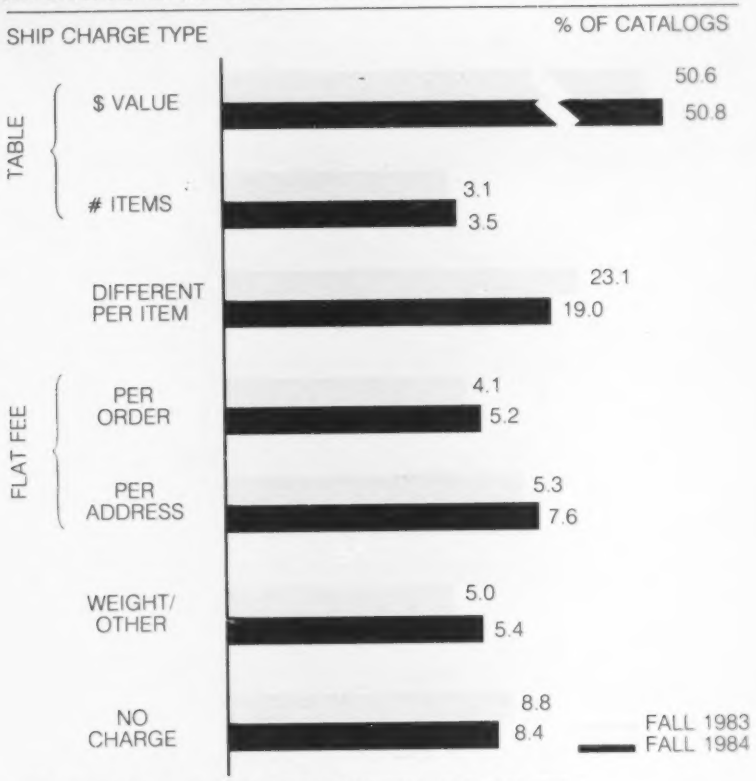
MEDIAN PRICE OF ITEMS OFFERED IN THREE SEASONS BY CONSUMER SPECIALTY CATALOGS*



*CATALOGSCAN™ DATA FROM 218 CATALOGS IN FALL 1983, SPRING 1984 AND FALL 1984

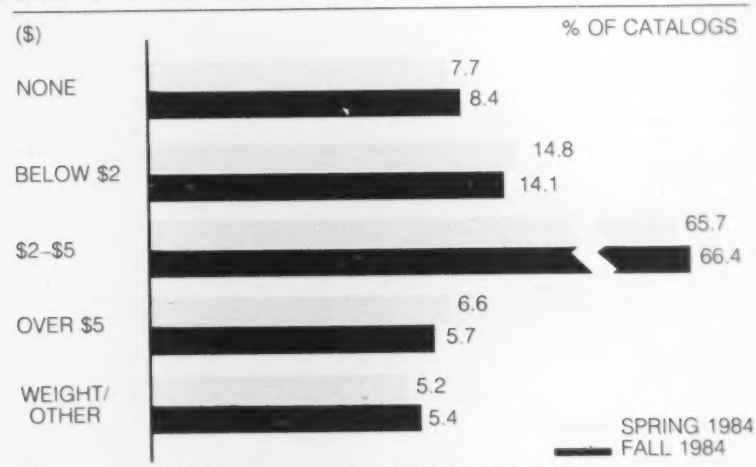
Source: Kestnbaum & Company 1985
Reprinted with permission from *Catalog Age*

METHOD OF COMPUTING SHIPPING CHARGES*



*CATALOGSCAN℠ DATA FROM 320 FALL 1983 AND 368 FALL 1984 CONSUMER CATALOGS

AVERAGE SHIPPING CHARGE PER ORDER*



*CATALOGSCAN℠ DATA FROM 271 SPRING 1984 AND 368 FALL CONSUMER CATALOGS

Source: Kestnbaum & Company, 1985
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DMA DIRECTORY ASSISTANCE SURVEY

This survey was designed to gather data concerning (a) current methods of collecting telephone number information; (b) the effect of the 50 cent interstate directory assistance charge ("IDA"), imposed by the Federal Communications Commission in May 1984, upon usage of IDA; and (c) the probable response and extent of use of a direct access system of updating telephone listing information.

The survey was conducted by mail in February, 1985. A questionnaire, along with a cover letter, was sent to all of the 1,994 DMA voting members. Five hundred two members (502) responded, establishing a response rate of 25 percent.

USE OF TELEPHONE NUMBER INFORMATION FOR DIRECT MARKETING APPLICATIONS

	TOTAL AVERAGE (296)
AVERAGE VOLUME OF NUMBERS SOUGHT PER MONTH	65,532
AVERAGE VOLUME OF DIRECTORY ASSISTANCE NUMBERS SOUGHT PER MONTH	3,863
EFFECT OF 50 CENT CHARGE	
INCREASED USAGE	11%
AVERAGE INCREASE	46%
DECREASED USAGE	36%
AVERAGE DECREASE	43%
NO CHANGE	40%
NOT APPLICABLE	2%

WAYS OF OBTAINING TELEPHONE LISTINGS

	TOTAL USING METHOD BASE (296)	AVERAGE % METHOD USAGE OF TOTAL VOLUME	RANGE
IN-HOUSE (TOTAL)	78% (203)	82%	1–100%
HARD COPY LOOK-UP	43% (128)	38%	1–100%
MICROFICHE LOOK-UP	4% (12)	29%	1–85%
MAGNETIC TAPE MATCHING	9% (27)	66%	10–100%
DIRECTORY ASSISTANCE LOOK-UP (AN OPERATOR)	58% (171)	53%	1–100%
OTHER	8% (24)	49%	1–100%
THROUGH AN OUTSIDE PROVIDER (TOTAL)	36% (107)	73%	5–100%
HARD COPY LOOK-UP	10% (29)	26%	5–100%
MICROFICHE LOOK-UP	2% (7)	50%	12.5–100%
MAGNETIC TAPE MATCHING	19% (56)	54%	2–100%
DIRECTORY ASSISTANCE LOOK-UP (AN OPERATOR)	16% (46)	50%	10–100%
OTHER	2% (5)	58%	
NO ANSWER	10% (29)		

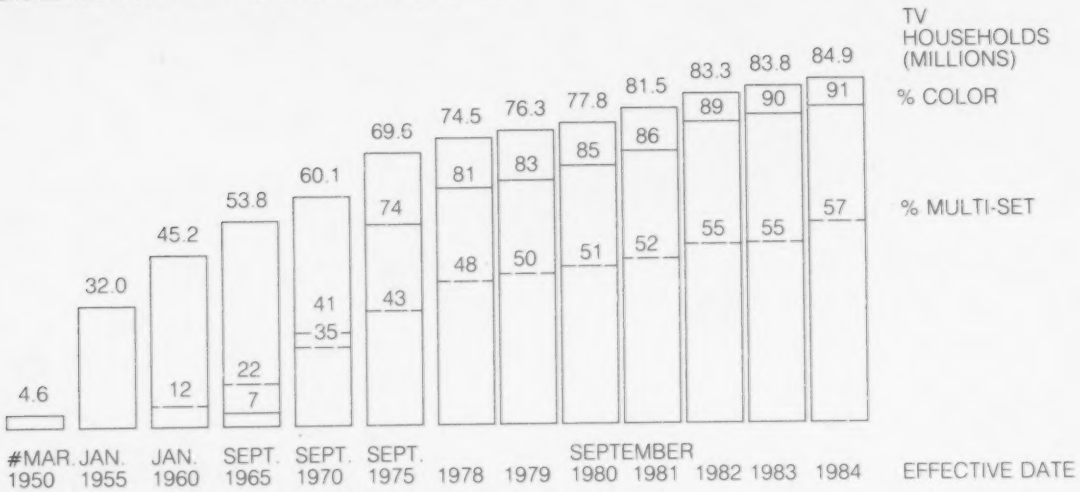
Not equal to 100% due to multiple answers and averages computed.

Source: Cohn and Marks, DMA, 1985

TV OWNERSHIP

91 Percent of Households Have Color
57 Percent Own More Than One Set

Nielsen estimates that 84.9 million U.S. households owned at least one TV set as of January 1984. 91% of these households had color TV and 57% had two or more sets.

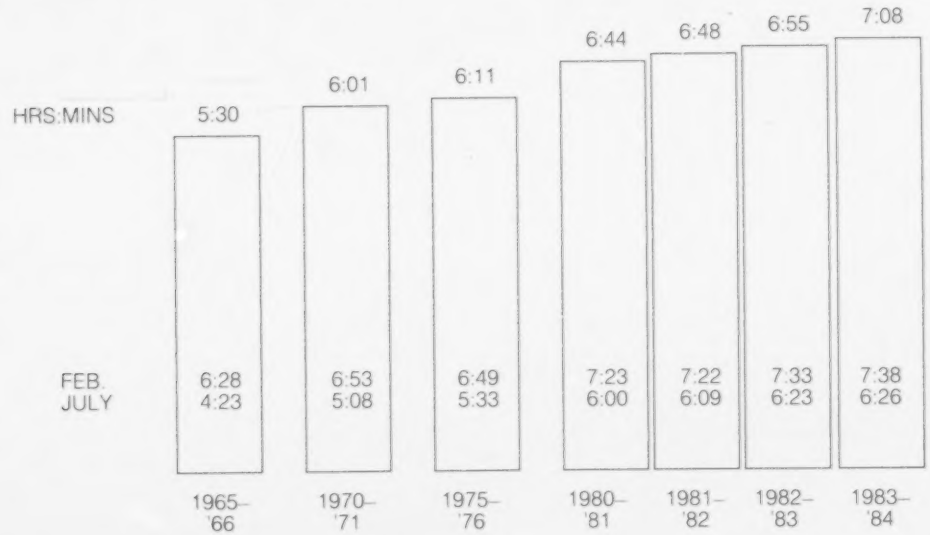


#TV OWNERSHIP U.S. CENSUS 1950–70; NIELSEN ESTIMATES 1975–84
COLOR: ARF CENSUS 1965; NIELSEN ESTIMATES 1970–84
MULTI-SET: U.S. CENSUS 1960–65; NIELSEN ESTIMATES 1970–84

*AS OF 1979, ESTIMATES BASED ON JAN. 1 OF FOLLOWING YEAR, EFFECTIVE IN SEPTEMBER.

AVERAGE HOURS OF HOUSEHOLD TV USAGE PER DAY

TV households viewed an average of seven hours and eight minutes a day during the 1983–84 TV season, the highest ever reported. This was a 13-minute increase over the 1982–83 season. February and July (representing high and low viewing periods respectively) also had increases in TV usage.



NIELSEN ESTIMATES BASED ON TOTAL U.S. HOUSEHOLDS
SEPT.–AUG. 48-WEEK AVERAGE EXCLUDING UNUSUAL DAYS.

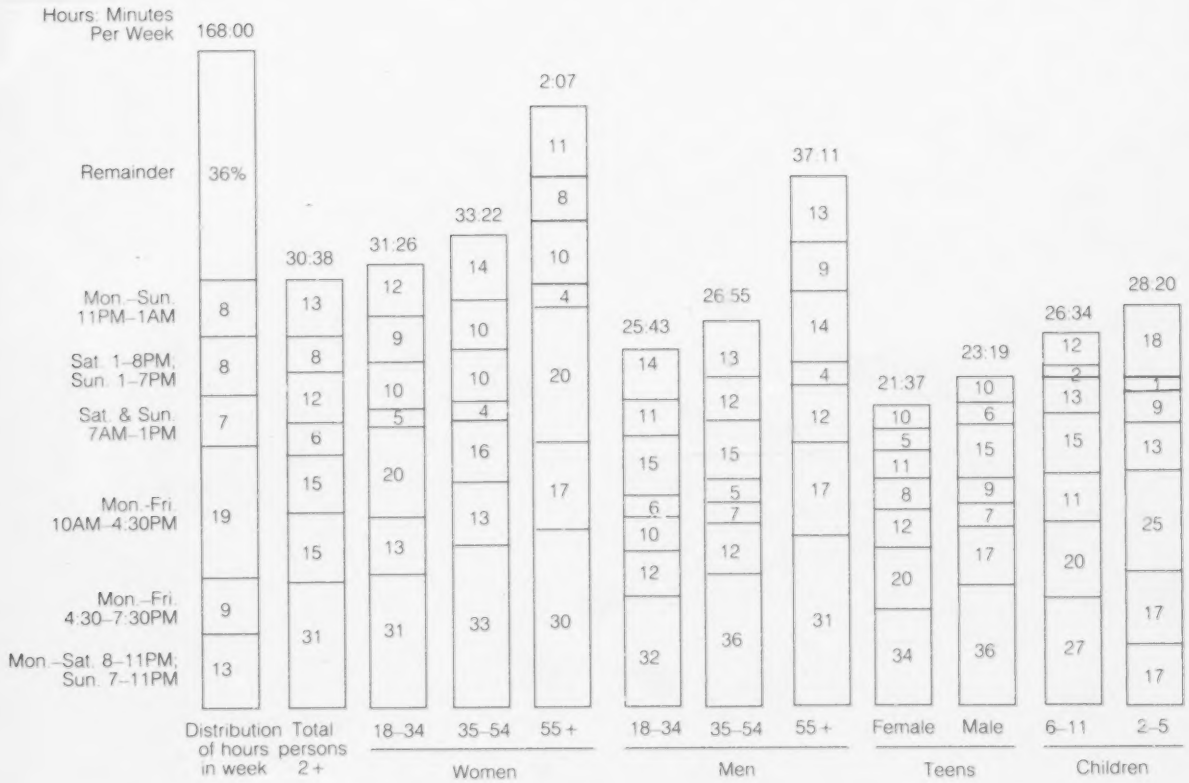
Source: A.C. Nielsen, 1985

WEEKLY VIEWING ACTIVITY FOR WOMEN, MEN, TEENS AND CHILDREN

NOVEMBER 1984
(FIGURES IN BARS ARE SHARES)

In general, women view more television than men; older adults view more than younger men and women; and younger children view more than older children and teenagers.

All but one of the demographic groups spend the greatest share of their time viewing television during prime time hours. The one exception is children 2–5, who spend the most time viewing weekdays 10 AM to 4:30 PM.



Source: A.C. Nielsen, estimated national audience demographics report, 1985

FALL 1985 CABLE TABLE

SURVEY DATES:SEPTEMBER '84–JULY '85

	ADULTS (000)	%	MEN (000)	%	WOMEN (000)	%	MEDIAN AGE ADULTS	MEN	WOMEN	MEDIAN H/D INCOME ADULTS	MEN	WOMEN
TOTAL U.S. POPULATION	169,855	100.0	80,676	100.0	89,179	100.0	40.4	39.5	41.3	27,729	29,371	26,090
CABLE SUBSCRIBERS	73,454	43.2	34,688	43.0	38,766	43.5	39.6	39.4	39.9	31,167	32,112	30,259
PAY TV SUBSCRIBERS	45,546	26.8	22,043	27.3	23,503	26.4	36.6	36.9	36.3	35,013	35,385	34,676
AVERAGE WEEK CUME												
CABLE NETWORKS	**ADULTS (000)**	**%**	**MEN (000)**	**%**	**WOMEN (000)**	**%**	**MEDIAN AGE ADULTS**	**MEN**	**WOMEN**	**MEDIAN H/D INCOME ADULTS**	**MEN**	**WOMEN**
ARTS & ENTERTAINMENT (A&E)	4,207	2.5	2,119	2.6	2,088	2.3	40.5	38.8	42.6	36,973	36,971	36,975
BET	1,938	1.1	1,047	1.3	891	1.0	33.8	31.5	37.6	29,578	31,268	28,537
COUNTRY MUSIC TELEVISION	5,824	3.4	3,040	3.8	2,784	3.1	41.1	40.3	41.7	27,418	27,820	27,032
CNN (CABLE NEWS NETWORK)	23,630	13.9	12,953	16.1	10,677	12.0	40.7	40.7	40.5	32,137	33,488	30,416
CNN (HEADLINE NEWS)	14,647	8.6	8,195	10.2	6,452	7.2	40.4	40.2	40.6	30,835	31,524	29,640
CBN CABLE NETWORK	10,887	6.4	5,365	6.7	5,522	6.2	37.8	36.8	38.9	28,316	28,773	27,813
C-SPAN	3,390	2.0	2,025	2.5	1,365	1.5	40.9	39.2	44.2	31,994	32,393	31,412
ESPN (ENT. & SPORTS PGM. NETWORK)	25,222	14.8	15,967	19.8	9,255	10.4	37.7	37.8	37.4	32,420	33,265	30,800
FNN (FINANCIAL NEWS NETWORK)	1,627	1.0	1,008	1.2	619	.7	38.8	35.8	47.0	32,837	32,059	34,306
THE LEARNING CHANNEL	1,364	.8	656	.8	708	.8	34.7	36.6	33.7	27,659	28,712	27,208
LIFETIME	5,489	3.2	2,662	3.3	2,827	3.2	35.6	34.9	36.3	34,706	34,688	34,721
MTV (MUSIC TELEVISION)	17,257	10.2	8,424	10.4	8,833	9.9	30.0	29.2	30.8	34,125	35,962	32,025
THE NASHVILLE NETWORK	9,099	5.4	5,149	6.4	3,950	4.4	41.4	41.4	41.4	23,060	30,086	24,974
NICKELODEON	7,441	4.4	3,038	3.8	4,403	4.9	32.6	33.2	32.2	31,876	33,607	30,566
SPN (SATELLITE PROGRAM NETWORK)	1,960	1.2	1,287	1.6	673	.8	39.4	38.8	40.7	30,641	30,446	30,891
SIN	984	.6	445	.6	539	.6	33.8	31.2	36.5	24,543	22,730	27,194
USA NETWORK	15,157	8.9	8,858	11.0	6,299	7.1	34.3	34.8	33.7	32,150	32,979	30,912
THE WEATHER CHANNEL	15,770	9.3	7,635	9.5	8,135	9.1	41.2	41.0	41.4	32,037	33,365	30,430
WGN-TV	14,778	8.7	7,464	9.3	7,314	8.2	35.3	35.3	35.3	30,214	31,076	29,111
WOR-TV	7,207	4.2	4,284	5.3	2,923	3.3	38.2	38.0	38.7	32,444	33,821	29,265
WTBS	25,555	15.0	13,322	16.5	12,233	13.7	36.8	37.3	36.1	29,798	31,262	28,228
PAY TV SERVICES												
CINEMAX	7,070	4.2	3,597	4.5	3,473	3.9	34.6	34.4	34.8	36,235	34,495	37,254
THE DISNEY CHANNEL	3,811	2.2	1,722	2.1	2,089	2.3	35.0	37.2	33.1	33,982	34,717	33,552
HOME BOX OFFICE (HBO)	29,795	17.5	14,636	18.1	15,159	17.0	36.2	36.2	36.2	35,564	36,383	34,748
MOVIE CHANNEL	6,437	3.8	3,287	4.1	3,150	3.5	34.9	35.6	34.3	35,042	36,857	33,295
PLAYBOY CHANNEL	1,169	.7	767	1.0	402	.5	32.6	34.3	27.3	29,104	30,817	28,248
SHOWTIME	10,834	6.4	5,659	7.0	5,175	5.8	34.5	35.8	33.4	35,000	36,104	33,941

Source: Mediamark Research Inc. All rights reserved by MRI

CABLE PENETRATION AND PROJECTED HOUSEHOLDS

TOP 50 DESIGNATED MARKET AREAS RANKED BY TV HOUSEHOLDS

Nielsen Station Index Estimates, November 1985

RANK	DESIGNATED MARKET AREA	% PENETRATION NOV '85	CABLE TV HH'S NOV '85	RANK	DESIGNATED MARKET AREA	% PENETRATION NOV '85	CABLE TV HH'S NOV '85
1	NEW YORK	38.2	2,562,730	26	SAN DIEGO	66.8	510,100
2	LOS ANGELES	36.2	1,598,990	27	ORLANDO-DAYTONA BEACH-MELBRN	53.7	383,940
3	CHICAGO	27.9	840,500	28	CINCINNATI	45.1	319,790
4	PHILADELPHIA	45.4	1,143,920	29	KANSAS CITY	45.7	321,750
5	SAN FRANCISCO-OAKLAND, SAN ROSA	48.9	1,009,020	30	MILWAUKEE	31.7	220,370
6	BOSTON, MANCHESTER	49.1	963,150	31	NASHVILLE	36.9	247,320
7	DETROIT	34.6	575,510	32	CHARLOTTE	43.7	280,980
8	WASHINGTON, D.C., HAGERSTOWN	29.5	458,100	33	NEW ORLEANS	52.9	335,860
9	DALLAS-FT. WORTH	38.2	589,040	34	BUFFALO	55.1	338,480
10	CLEVELAND, AKRON	44.7	636,760	35	GREENVILLE-SPART-ASHEVILLE	40.5	248,740
11	HOUSTON	42.2	587,380	36	COLUMBUS, OH	47.6	286,700
12	PITTSBURGH	60.3	741,820	37	OKLAHOMA CITY	51.1	306,680
13	ATLANTA	42.2	500,680	38	BIRMINGHAM, ANNISTON	46.5	272,980
14	SEATTLE-TACOMA	51.9	610,850	39	RALEIGH-DURHAM	43.8	255,870
15	TAMPA-ST. PETERSBURG	46.9	545,380	40	SALT LAKE CITY	33.0	192,080
16	MIAMI-FT. LAUDERDALE	46.4	539,920	41	GRAND RAPIDS-KALMZOO-B. CRK	48.5	279,650
17	MINNEAPOLIS-ST. PAUL	26.4	305,650	42	PROVIDENCE-NEW BEDFORD	51.2	293,380
18	ST. LOUIS	33.8	353,040	43	MEMPHIS	42.7	239,410
19	DENVER	41.0	407,190	44	HARRISBURG-LANCSTER-LEB-YORK	57.6	300,290
20	SACRAMENTO-STOCKTON	33.4	297,040	45	SAN ANTONIO	62.9	325,880
21	BALTIMORE	29.5	257,820	46	WILKES BARRE-SCRANTON	67.7	349,460
22	INDIANAPOLIS, LAFAYETTE	49.2	427,080	47	LOUISVILLE	49.1	252,770
23	PHOENIX	38.3	322,720	48	NORFOLK-PORSTMTH-NEWPORT NEWS	52.1	264,720
24	HARTFORD & NEW HAVEN	65.2	523,230	49	CHARTLESTON-HUNTINGTON	62.4	311,889
25	PORTLAND, OR	46.3	361,480	50	ALBANY-SCHENECTADY-TROY	57.1	275,800

Source: A.C. Nielsen, 1985

CABLE VIEWING

	1ST 9 MONTHS 1983		1ST 9 MONTHS 1984		1ST 9 MONTHS 1985		% CHANGE '84 VS '85	% CHANGE '83 VS '85
	HRS: MINS	SHARE	HRS: MIN	SHARE	HRS: MINS	SHARE		
IN ALL CABLE TV HH								
SATELLITE NETWORKS	5:26	10	7:09	13	8:05	15	+13	+49
SUPERSTATIONS	4:13	8	4:47	9	4:53	9	+ 2	+16
TOTAL AD-SUPPORTED CABLE	9:39	18	11:56	22	12:58	24	+ 9	+34
PAY SERVICES	6:04	12	6:03	11	6:16	12	+ 4	+ 3
NETWORK AFFILIATES	30:52	59	31:19	57	29:31	55	− 6	− 4
INDEPENDENTS	7:25	14	6:57	13	6:51	13	− 2	− 8
PUBLIC	1:35	3	1:28	3	1:36	3	+ 9	+ 1
TOTAL USAGE	52:29		54:30		54:08		− 1	+ 3
IN PAY TV HH								
SATELLITE NETWORKS	6:13	11	8:04	14	8:58	16	+11	+44
SUPERSTATIONS	4:22	8	4:50	8	4:52	8	+ 1	+12
TOTAL AD-SUPPORTED CABLE	10:35	19	12:53	22	13:50	24	+ 7	+31
PAY SERVICES	10:04	18	10:25	18	10:28	18	+ 1	+ 4
NETWORK AFFILIATES	30:07	53	30:37	53	28:34	49	− 7	− 5
INDEPENDENTS	8:18	15	7:23	13	7:18	13	− 1	−12
PUBLIC	1:26	3	1:27	2	1:31	3	+ 5	+ 7
TOTAL USAGE	56:21		58:13		57:43		− 1	+ 2

Source: A. C. Nielsen, Prepared by Cabletelevision Advertising Bureau

TOP 20 CABLE SYSTEMS

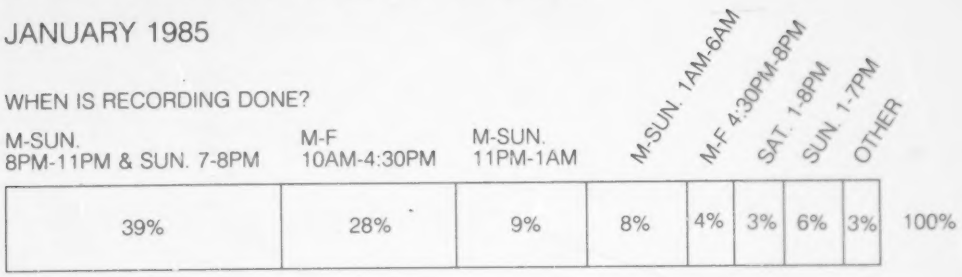
RANK LOCATION	OPERATOR	BASIC SUBS
1. SAN DIEGO	COX CABLE	264,963
2. WOODBURY (LONG ISLAND), NY	CABLEVISION CO.	242,946
3. MANHATTAN, NY	ATC	206,900
4. SAN ANTONIO, TX	ROGERS CABLESYSTEMS	200,946
5. ORLANDO/ORMOND BEACH, FL	ATC	195,700
6. HOUSTON, TX	WARNER AMEX	194,946
7. EAST ORANGE, NJ	MACLEAN HUNTER	174,915
8. HONOLULU, HI	ATC	156,946
9. PHOENIX, AZ	TIMES M	142,000
10. LOUISVILLE/JEFF CO., KY	STOUN.	140,946
11. WAYNE, NJ	UA COLUMBIA CABLEVISION	140,000
12. CINCINNATI, OH	WARNER AMEX	137,946
13. TULSA, OK	UNITED CABLE	136,000
14. ENGLEWOOD, CO	UNITED CABLE	133,946
15. PLAINVILLE/HARTFORD	UNITED CABLE	130,000
16. MANHATTAN, NY	GROUP W CABLE	126,946
17. AUDUBON, NJ	NEW YORK TIMES	125,337
18. TIDEWATER (NORFOLK), VA	COX CABLE	124,946
19. ATLANTA, GA	PRIME CABLE	120,755
20. ERIE COUNTY, NY	PRIME CABLE CORP.	119,946

Source: Ellentuck and Springer, 1986

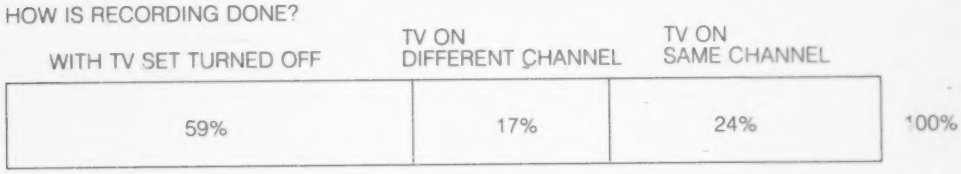
VIDEO CASSETTE RECORDER ACTIVITY IN VCR HOMES

JANUARY 1985

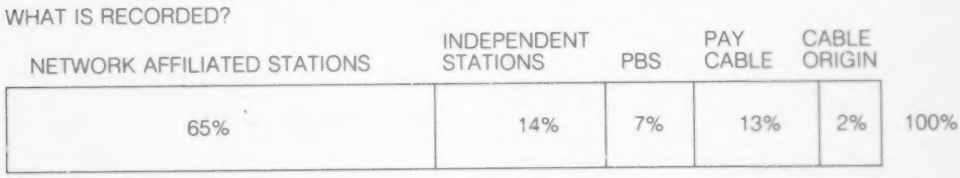
WHEN IS RECORDING DONE?



HOW IS RECORDING DONE?



WHAT IS RECORDED?



VCR PENETRATION IN TOP MARKETS
(NATIONAL AVERAGE = 100 INDEX)

	INDEX
NEW YORK	137
LOS ANGELES	161
CHICAGO	155
PHILADELPHIA	119
SAN FRANCISCO	179

VCR ACTIVITY AS A PERCENT OF TV USAGE
(JANUARY 1985: TOTAL DAY BASIS)

	TOTAL U.S. HOMES	MAJOR MARKETS HOMES
RECORD	5.9 (100)	5.8 (98)
PLAYBACK	8.9 (100)	8.9 (100)
TOTAL ACTIVITY (RECORD & PLAYBACK)	14.8 (100)	14.7 (99)

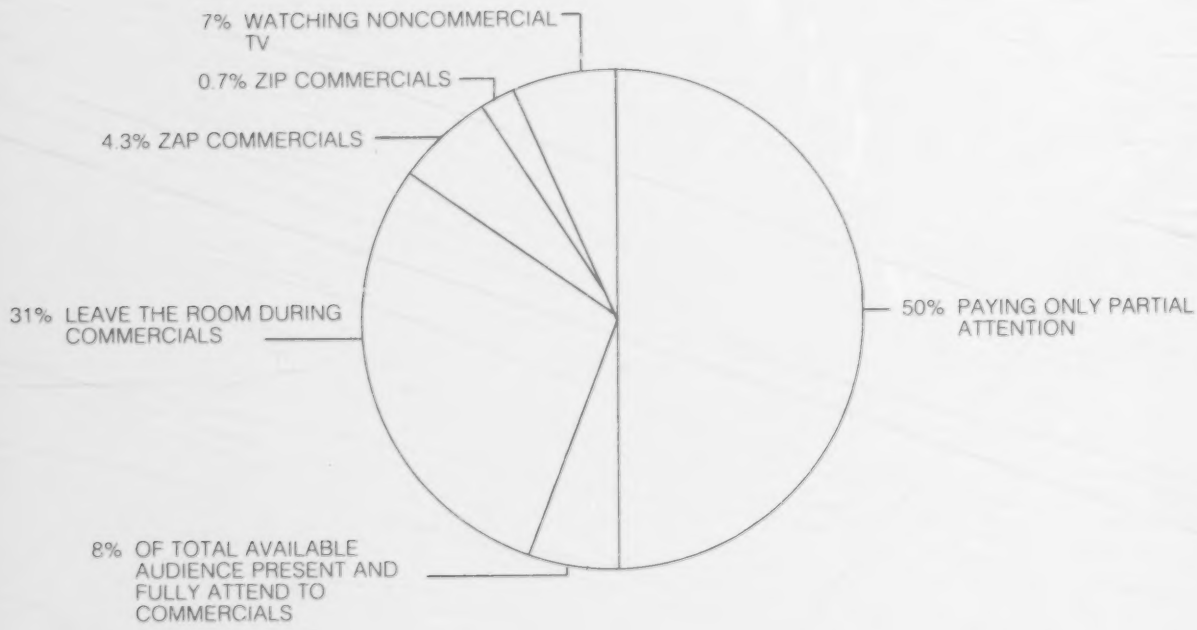
Source: A. C. Neilsen, 1985

VCR USERS ATTITUDES TOWARD TV ADVERTISING

ATTITUDE TOWARD TV ADVERTISING	PERCENTAGE OF RESPONDENTS FINDING ADS... ALWAYS	USUALLY	SOMETIMES	RARELY	NEVER
ENTERTAINING[1]	1%	17%	60%	20%	2%
INFORMATIVE[2]	0.3	14	54	29	2.7
BELIEVABLE	0	7	53	36	4
ANNOYING	4	41	48	6	1
CONDESCENDING	2	34	55	8	1

[1] Those who find TV advertising "always" or "usually" to be entertaining (or informative/believable).
[2] Those who find TV advertising "rarely" or "never" entertaining, etc.

HOW TV AUDIENCE AVOIDS PRIME-TIME COMMERCIALS


7% WATCHING NONCOMMERCIAL TV
0.7% ZIP COMMERCIALS
4.3% ZAP COMMERCIALS
31% LEAVE THE ROOM DURING COMMERCIALS
50% PAYING ONLY PARTIAL ATTENTION
8% OF TOTAL AVAILABLE AUDIENCE PRESENT AND FULLY ATTEND TO COMMERCIALS

Source: Florida State University, 1985
Technographics Research Project
DRS. Edward Forrest & Barry Sapolsky

MAGAZINE REVENUES
$ BILLIONS
(INDEX VS. YEAR AGO)

FIGURES ARE FOLIO ESTIMATES FOR THE CALENDAR YEAR 1984

	ADVERTISING	SUBSCRIPTION	NEWSSTAND	TOTAL
1980	4.5 (107)	2.1 (117)	1.8 (106)	8.3 (108)
1981	6.0 (111)	2.3 (110)	2.0 (111)	9.0 (108)
1982	5.4 (108)	2.8 (114)	2.0 (100)	9.9 (110)
1983	6.2 (114)	2.9 (111)	2.0 (103)	11.0 (111)
1984	7.1 (116)	3.0 (106)	2.1 (103)	12.2 (111)

Indexes are actual; numbers are rounded to first decimal

AVERAGE CIRCULATION
MILLIONS
(INDEX VS. YEAR AGO)

FIGURES ARE FOLIO ESTIMATES FOR THE CALENDAR YEAR 1984

	SUBSCRIPTION	NEWSSTAND	CONTROLLED	TOTAL
1980	207.8 (107)	90.6 (104)	48.2 (86)	346.6 (103)
1981	203.3 (98)	81.2 (90)	51.1 (106)	335.6 (97)
1982	206.6 (102)	81.9 (101)	50.0 (98)	338.5 (101)
1983	209.3 (102)	79.7 (97)	52.5 (105)	341.5 (101)
1984	213.8 (102)	76.9 (96)	53.0 (101)	343.7 (101)

Indexes are actual; numbers are rounded to first decimal

Source: ©1985 Folio Publishing Corporation

TOP 20 CONSUMER MAGAZINES BY AVERAGE SUBSCRIPTION CIRCULATION

FIGURES ARE FOLIO ESTIMATES FOR THE CALENDAR YEAR 1984

RANK 1984	MAGAZINE NAME	1984 AVERAGE SUBSCRIPTION CIRC.	% CHG. '83/'84
1	READER'S DIGEST	17,014,098	−0.5
2	MODERN MATURITY	10,329,119	14.0
3	NATIONAL GEOGRAPHIC	10,229,652	−2.2
4	TV GUIDE	8,621,147	6.2
5	BETTER HOMES AND GARDENS	7,488,786	0.4
6	MCCALL'S	5,506,841	−1.1
7	TIME	4,400,883	−0.3
8	GUIDEPOSTS	4,174,478	3.0
9	LADIES' HOME JOURNAL	4,092,310	−4.5
10	GOOD HOUSEKEEPING	3,404,491	−0.8
11	REDBOOK	3,314,733	−0.4
12	CONSUMER REPORTS	2,991,714	6.8
13	NEWSWEEK	2,845,996	0.7
14	PREVENTION	2,793,763	8.9
15	SPORTS ILLUSTRATED	2,558,371	7.7
16	THE AMERICAN LEGION	2,502,836	−0.3
17	PLAYBOY	2,365,492	1.7
18	SOUTHERN LIVING	2,109,417	1.5
19	SMITHSONIAN	2,076,879	7.0
20	U.S. NEWS & WORLD REPORT	2,033,459	−0.7

TOP 20 BUSINESS MAGAZINES BY AVERAGE SUBSCRIPTION CIRCULATION

FIGURES ARE FOLIO ESTIMATES FOR THE CALENDAR YEAR 1984

RANK 1984	MAGAZINE NAME	1984 SUB. CIRC.	% CHG. '83/'84
1	FARM JOURNAL	925,515	−5.7
2	REAL ESTATE TODAY	617,696	4.8
3	PROGRESSIVE FARMER	569,786	−12.5
4	SUCCESSFUL FARMING	548,562	−5.7
5	NURSING '84	511,140	−3.5
6	RN	327,593	−10.5
7	ABA JOURNAL	324,957	1.0
8	AMER. JOURNAL OF NURSING	315,630	−0.3
9	JOURNAL OF ACCOUNTANCY	273,086	3.6
10	AOPA PILOT	267,364	1.4
11	FLYING	254,291	−0.1
12	INSTRUCTOR	251,947	−3.0
13	JOURNAL OF THE AMA	241,184	0.3
14	AMERICAN MEDICAL NEWS	223,176	−3.1
15	NEW ENGLAND JOUR. OF MED.	212,071	2.8
16	HOARD'S DAIRYMAN	185,879	−5.3
17	PRAIRIE FARMER	182,840	−5.7
18	BUILDER	170,112	3.1
19	SCIENCE	154,369	−1.5
20	THE FARMER	144,256	−3.8

Source: ©1985 Folio Publishing Corporation

TOP 50 CONSUMER MAGAZINES BY AVERAGE AD PAGES PER COPY

FIGURES ARE FOLIO ESTIMATES FOR THE CALENDAR YEAR 1984

RANK 1984	MAGAZINE NAME	1984 AVG. AD PAGES/COPY	RANK 1984	MAGAZINE NAME	1984 AVG. AD PAGES/COPY
1	QUARTER HORSE JOURNAL	365	26	MADEMOISELLE	140
2	BRIDE'S	318	27	D	136
3	BYTE	302	28	PHILADELPHIA MAGAZINE	136
4	VOGUE	289	29	SAIL	136
5	MODERN BRIDE	265	30	THE BLOOD-HORSE	134
6	PC	225	31	FORTUNE	134
7	LOS ANGELES MAGAZINE	211	32	ARCHITECTURAL DIGEST	133
8	COSMOPOLITAN	208	33	BOATING	133
9	PC WORLD	194	34	SOUTHERN LIVING	133
10	GLAMOUR	180	35	FORBES	132
11	YACHTING	172	36	MONEY	126
12	GOOD HOUSEKEEPING	169	37	BETTER HOMES AND GARDENS	125
13	WASHINGTONIAN MAGAZINE	165	38	INC.	125
14	GENTLEMEN'S QUARTERLY	160	39	SEVENTEEN	125
15	PERSONAL COMPUTING	159	40	TRAILER LIFE	123
16	TOWN & COUNTRY	159	41	CREATIVE COMPUTING	121
17	MOTOR BOATING & SAILING	156	42	EASTERN REVIEW	114
18	SAN DIEGO MAGAZINE	155	43	ESQUIRE	113
19	BOSTON MAGAZINE	153	44	UNITED	113
20	HARPER'S BAZAAR	152	45	SKI	111
21	SUNSET	149	46	TRAVEL & LEISURE	109
22	CHICAGO	148	47	BICYCLING	108
23	CRUISING WORLD	145	48	WORKING WOMAN	108
24	TEXAS MONTHLY	142	49	MUSCLE & FITNESS	107
25	SKIING	141	50	FAMILY CIRCLE	106

Source: ©Folio Publishing Corporation, 1985

THE TOP 15 MAGAZINES OF 1984
MEASURED BY CORPORATE
& ASSOCIATION ADVERTISING

	CORPORATE ADVERTISING PAGES	DOLLARS
1. BUSINESS WEEK	1,044.14	40,414,958
2. FORBES	994.83	29,747,719
3. FORTUNE	909.89	30,126,597
4. SPECTRUM	612.15	3,307,453
5. ECONOMIST	535.91	2,334,509
6. TIME	347.41	37,871,031
7. NEWSWEEK	313.82	23,890,833
8. US NEWS & WORLD REPORT	282.61	14,456,561
9. INDUSTRY WEEK	266.79	3,452,092
10. NEW YORKER	237.67	4,066,692
11. SCIENTIFIC AMERICAN	216.85	4,590,054
12. SPORTS ILLUSTRATED	205.28	15,109,266
13. TV GUIDE	186.81	14,572,197
14. BLACK ENTERPRISE	152.14	1,622,141
15. DUN'S BUSINESS MONTH	146.31	2,013,925

Source: PIB Corporate and Association Report, 1984

TOP 20 NATIONAL NEWSPAPER ADVERTISERS

RANK	1984 INVESTMENTS	1983 INVESTMENTS
1. GENERAL MOTORS CORP.	$109,359,000	$ 88,579,000
2. R.J. REYNOLDS INDUSTRIES, INC.	101,990,000	112,343,000
3. PHILIP MORRIS, INC.	69,023,000	65,272,000
4. FORD MOTOR CO.	62,063,000	49,603,000
5. AMERICAN TELEPHONE & TELEGRAPH CO.	58,200,000	71,995,000
6. RCA CORP.	36,962,000	31,716,000
7. INTERNATIONAL BUSINESS MACHINES CORP.	36,036,000	11,720,000
8. CHRYSLER CORP.	34,962,000	31,846,000
9. DELTA AIR LINES, INC.	26,331,000	31,810,000
10. BATUS INC.	25,317,000	27,803,000
11. CBS INC.	21,519,000	15,829,000
12. TRANS WORLD AIRLINES, INC.	21,436,000	21,925,000
13. EASTERN AIR LINES, INC.	18,654,000	22,461,000
14. TEXAS AIR CORP.	17,636,000	12,390,000
15. LOEWS CORP.	17,095,000	22,533,000
16. U.S. GOVERNMENT	16,797,000	11,548,000
17. AMERICAN BROADCASTING COMPANIES, INC.	16,155,000	10,304,000
18. GENERAL ELECTRIC CO.	14,984,000	12,220,000
19. TOYOTA MOTOR SALES, U.S.A. INC.	14,913,000	12,571,000
20. AMR CORP.	13,496,000	12,790,000

Source: Marketing and Media Decisions, June, 1985

TYPICAL NATIONAL INSERT CPMs FOR SUNDAY NEWSPAPERS
(TOP 100 MSAs)
CPM—Cost Per Thousand
MSA—Metropolitan Statistical Area

	TOTAL CIRCULATION (IN 000s)	COST PER THOUSAND FOR:			
		2 PAGES	4 PAGES	8 PAGES	12 PAGES
TOP 10	15,411.3	$37.87	$38.46	$44.87	$50.05
TOP 25	24,619.4	38.51	39.27	45.32	50.55
TOP 50	33,591.4	38.55	39.42	45.36	50.60
TOP 75	39,248.0	38.59	39.46	45.41	50.65
TOP 100	42,556.1	38.63	39.50	45.45	50.68

Source: Newspaper Advertising Bureau, Inc., February 1986

NEWSPAPER INSERT ADVERTISING VOLUME

	FREE-STANDING INSERTS (CARD & MULTI-PAGE) (MILLIONS)	FREE-STANDING INSERT REVENUE (THOUSANDS)
1975	15,800	NA
1977	20,101	$1,086,000
1979	27,132	1,776,604
1981	28,708	2,288,542
1983	35,727	3,095,000
1984 (EST.)	41,265	3,691,407
1985	45,379	4,178,673

Source: Newspaper Advertising Bureau, Inc., February, 1986

AVERAGE EXPENDITURE FOR ONE AD

	1979	1981	1983	1985
1-PAGE FOUR-COLOR	$ 7,715	$ 7,740	$ 9,045	$ 8,650
2-PAGE SPREAD, FOUR-COLOR	10,175	10,950	12,310	13,455
1-PAGE BLACK & WHITE	3,195	2,830	3,410	2,960
2-PAGE SPREAD, BLACK & WHITE	5,480	5,180	5,065	7,180

Source: Trout and Ries Advertising, 1986

MARKETS

39 CONSUMER DEMOGRAPHICS

44 CONSUMER PRICE INDEX

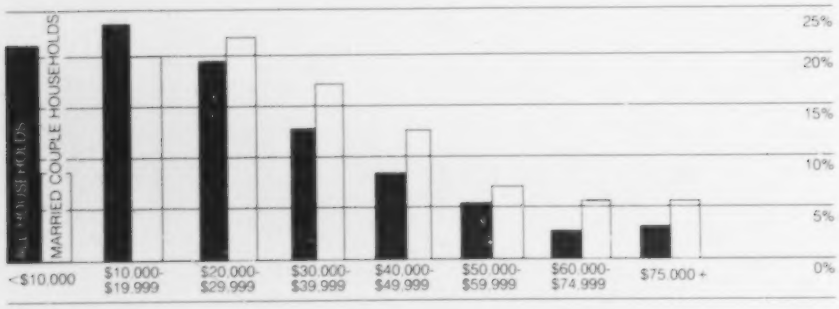
45 CONSUMER BEHAVIOR

51 BUSINESS-TO-BUSINESS

56 FINANCIAL SERVICES/INSURANCE

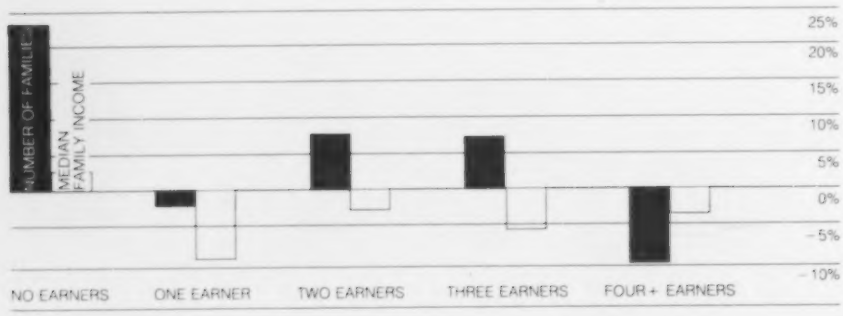
64 CREDIT CARDS

DISTRIBUTION OF HOUSEHOLDS, BY 1984 INCOME



Source: American Demographics, January 1986

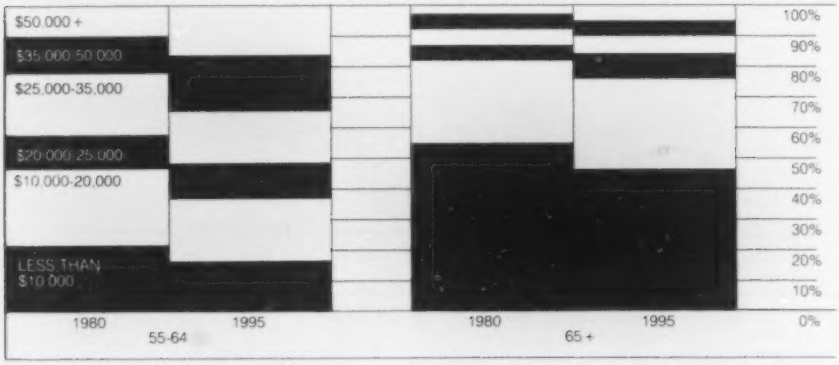
PERCENTAGE CHANGE IN NUMBER OF FAMILIES AND IN MEDIAN FAMILY INCOME, BY NUMBER OF EARNERS



Source: U.S. Bureau of the Census, "American Demographics," 1985

INCOMES OF THE MATURE MARKET

INCOMES WILL RISE FOR ALL MATURE HOUSEHOLDS BETWEEN 1980 AND 1995.



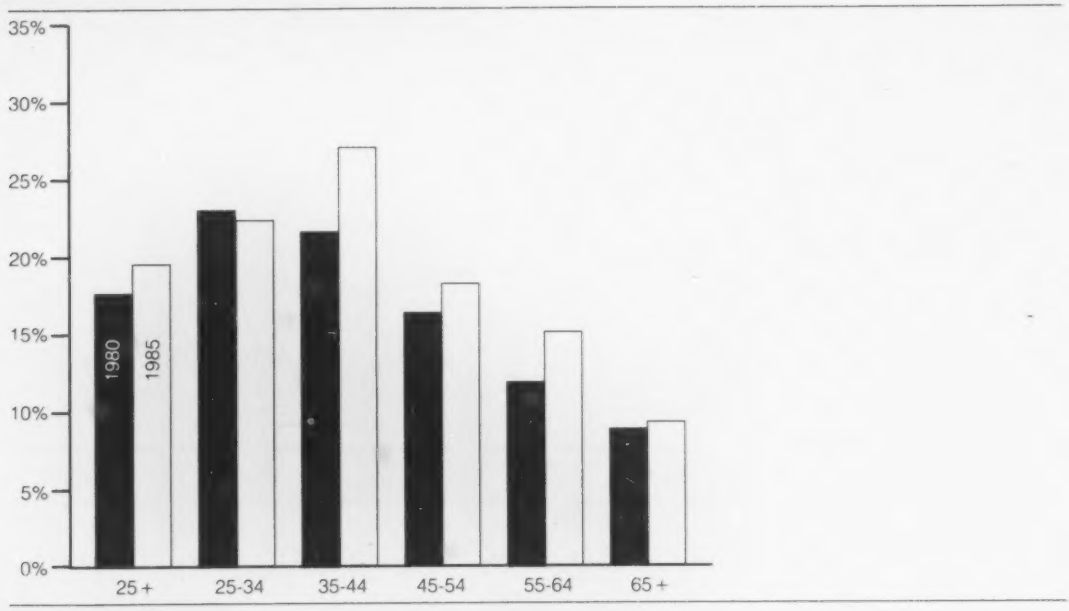
Source: American Demographics, 1985

POPULATION BY AGE, 1985 TO 2000
(IN THOUSANDS)

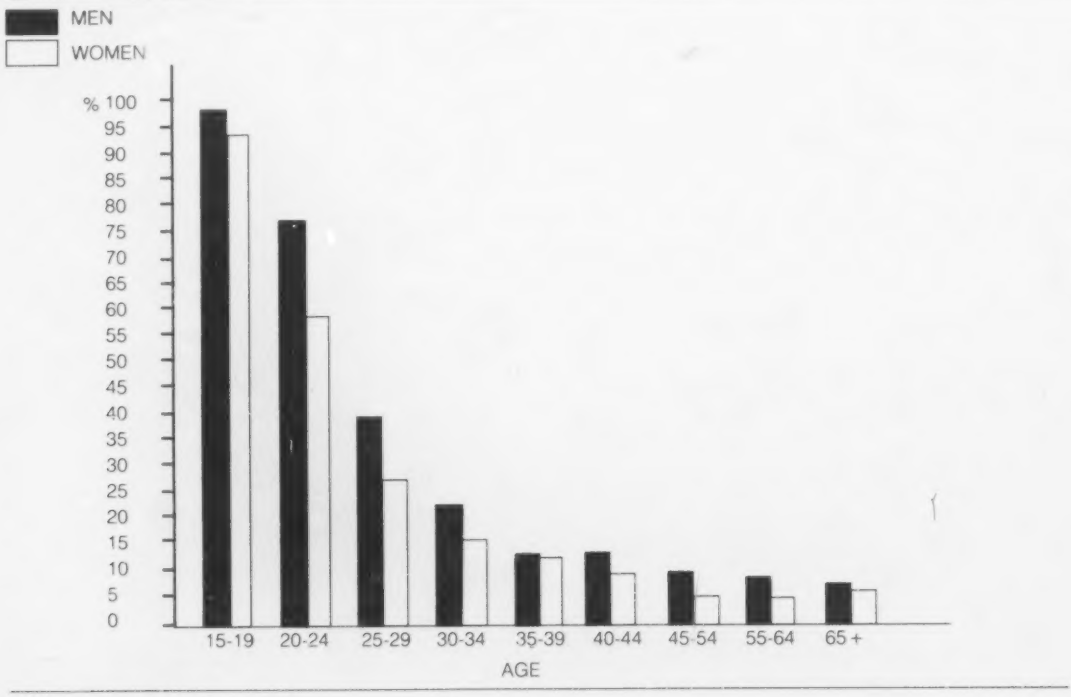
	1985	1990	1995	2000	PERCENT CHANGE 1985-2000
ALL AGES	238,631	249,657	259,559	267,355	12.3%
UNDER 15	51,861	54,582	56,724	55,903	7.8
15 TO 24	39,717	35,548	34,110	36,088	−9.1
25 TO 34	41,788	43,529	40,520	36,415	−12.9
35 TO 44	32,004	37,847	41,997	43,743	36.7
45 TO 54	22,464	25,402	31,397	37,119	65.2
55 TO 64	22,188	21,051	20,923	23,767	7.1
65 AND OLDER	28,609	31,697	33,888	34,921	22.1

Source: U.S. Bureau of the Census, American Demographics, 1985

PERCENT OF POPULATION WITH FOUR OR MORE YEARS OF COLLEGE, BY AGE

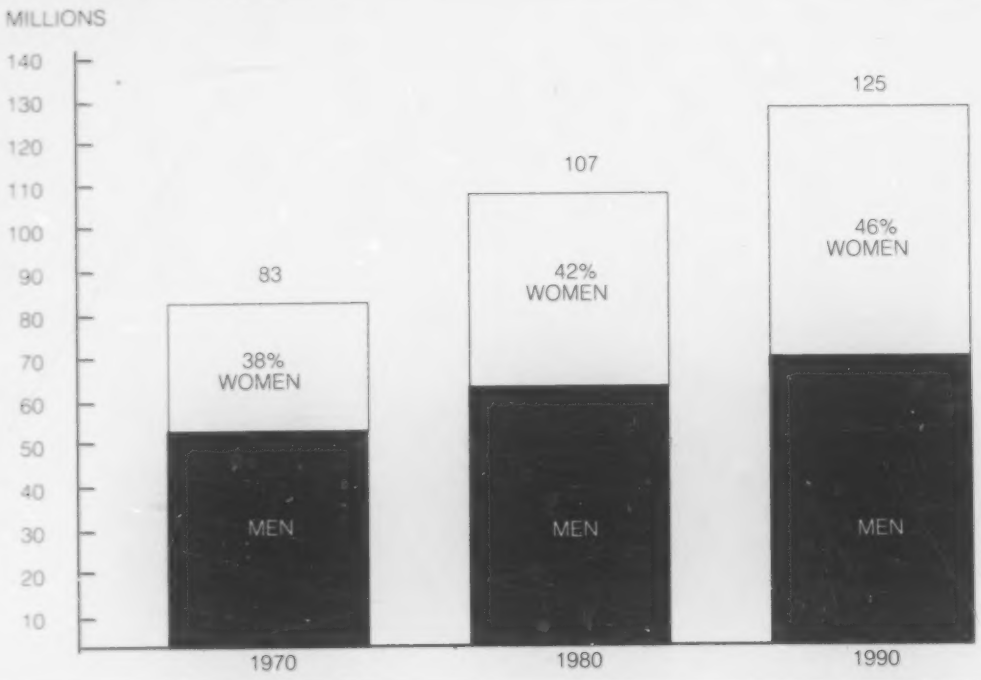


PERCENT OF POPULATION NEVER MARRIED, BY AGE



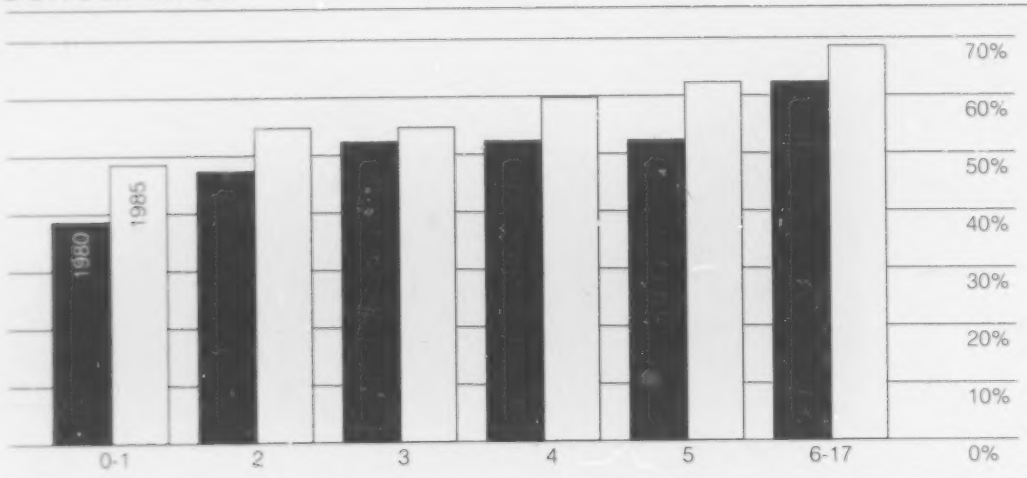
Source: American Demographics, January 1986

ANALYSIS OF LABOR FORCE M/F



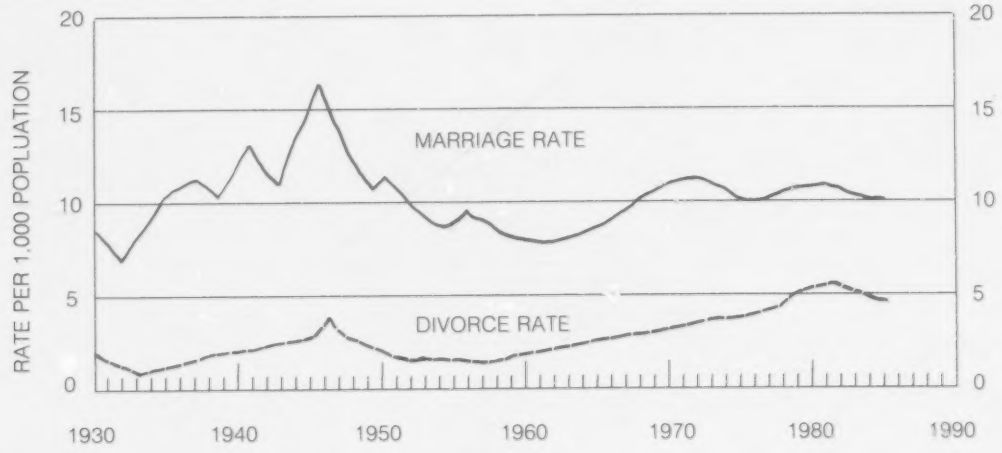
Source: American Demographics, 1984

LABOR FORCE PARTICIPATION RATE OF MARRIED WOMEN, BY AGE OF YOUNGER CHILD



Source: American Demographics, January 1986

MARRIAGE AND DIVORCE RATES: UNITED STATES, 1930-1985



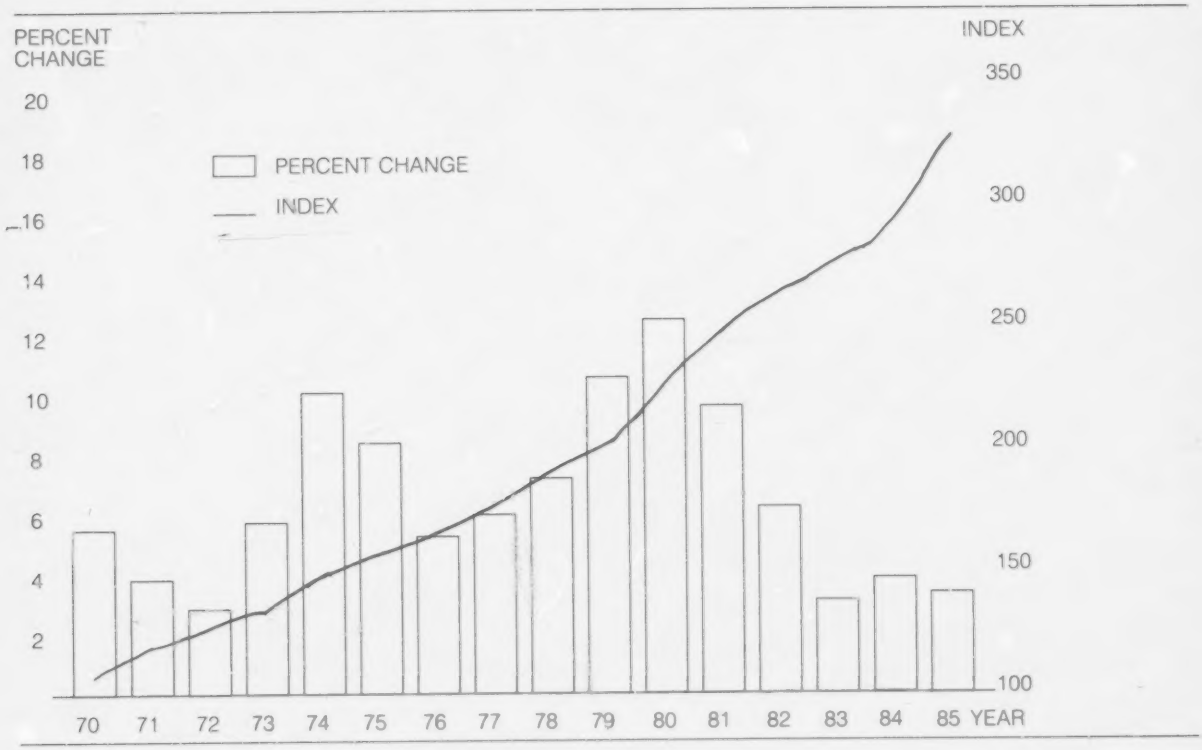
Note: 1985 Figure represents January-November period

BIRTHS PER 1,000 WOMEN AGED 15-44: 1975-1985

Note: 1985 figure represents January-November period.

Source: U.S. Department of Health and Human Services, 1985

CONSUMER PRICE INDEXES: 1970-1985
ANNUAL PERCENT CHANGE



Source: U.S. Bureau of Labor Statistics, 1986

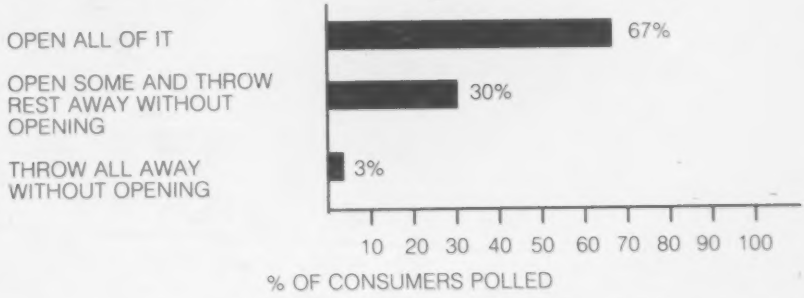
The following charts are from the Simmons Pilot Study conducted in July 1984. The Study was sponsored by Rapp & Collins, Inc., a division of the Doyle Dane Bernbach Group, Inc.

SIMMONS STUDY OF CONSUMER PURCHASING BEHAVIOR

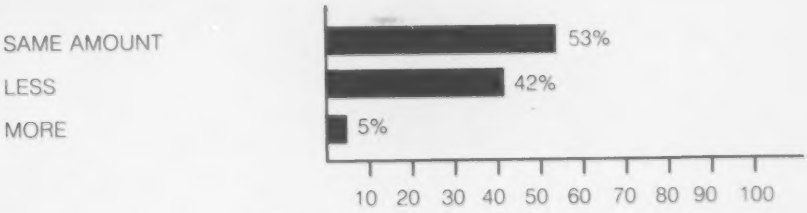
In October 1984, Simmons Market Research Bureau, Inc. released the results of the first-ever study of consumer buying at home by mail or phone. The study covered goods and services purchased in July 1984 only. It was found that a total of $12 billion dollars of goods and services were purchased at home by mail or phone during this month alone.

The following four charts summarize some of the findings from the 500 page pilot study available from Simmons.

REACTIONS TO ADVERTISING MAIL

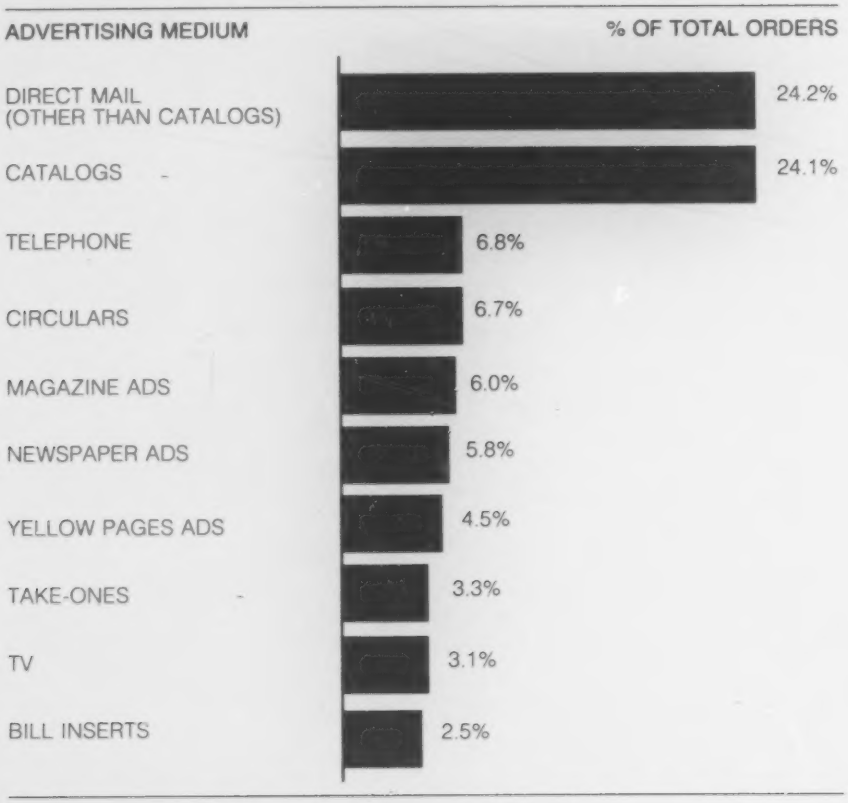

OPEN ALL OF IT
67%
OPEN SOME AND THROW REST AWAY WITHOUT OPENING
30%
THROW ALL AWAY WITHOUT OPENING
3%
10 20 30 40 50 60 70 80 90 100
% OF CONSUMERS POLLED

AMOUNT OF ADVERTISING MAIL CONSUMERS WOULD PREFER TO RECEIVE

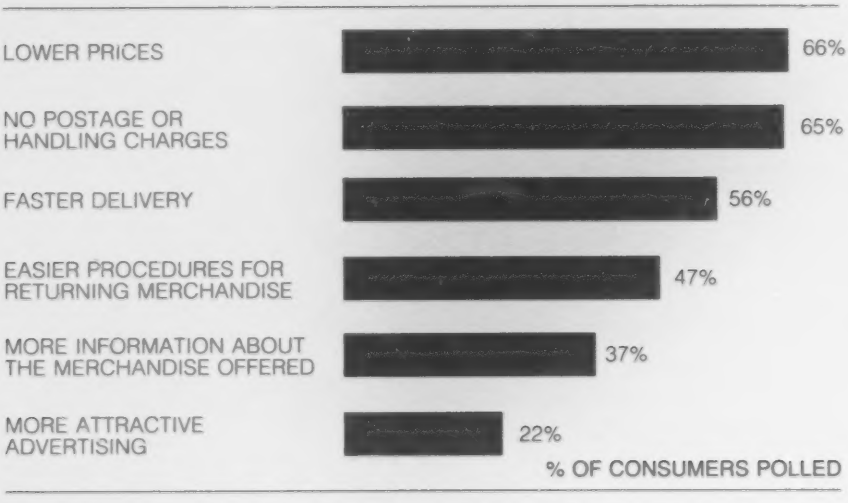


Source: Simmons Market Research Bureau, Inc., 1984
©1984 Doyle Dane Bernbach/New York

SOURCES THAT PRODUCED CONSUMER OFFERS

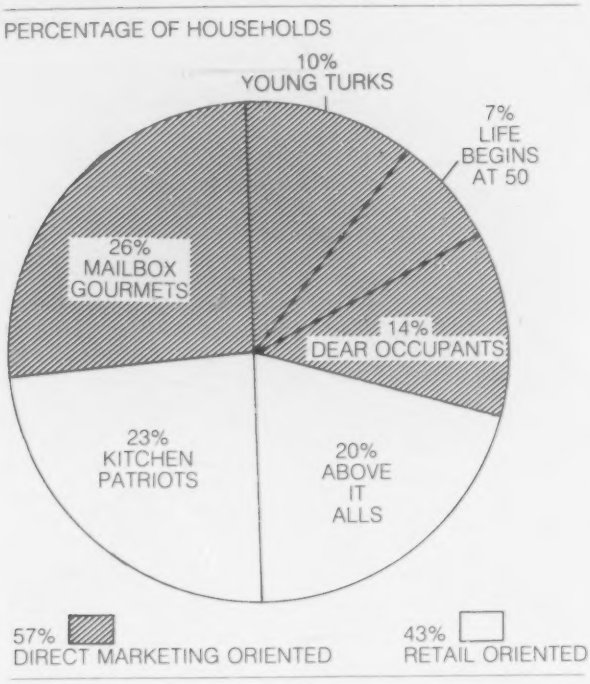


FACTORS THAT WOULD INFLUENCE CONSUMERS TO BUY MORE

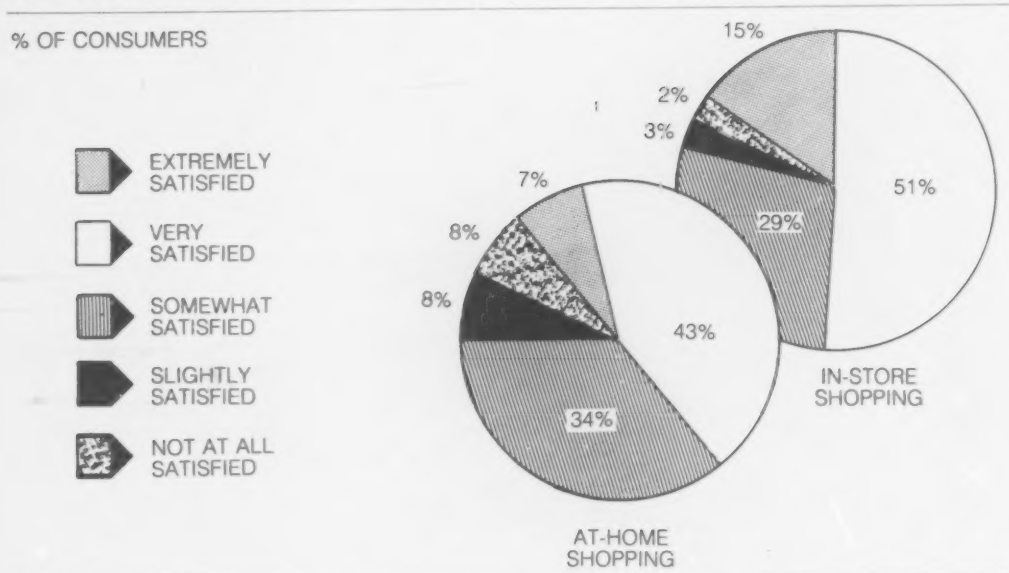


Source: Simmons Market Research Bureau, Inc., 1985
©1984 Doyle Dane Bernbach/New York

DIRECT MARKETING ORIENTED VS. RETAIL ORIENTED



CONSUMER SATISFACTION RATES



Source: Stone and Adler, 1985

Source: Simmons Market Research Bureau Inc., 1984
©1984 Doyle Dane Bernbach/New York

RELIABILITY OF MAIL ORDER COMPANIES IN STANDING BEHIND THE PRODUCTS THEY OFFER VS. RETAIL STORES

MORE RELIABLE	2.1%
THE SAME	59.8%
LESS RELIABLE	35.8%
DON'T KNOW/NO ANSWER	2.4%

Source: Better Homes and Gardens Consumer Panel, 1984

The following three charts are from the Webcraft Mail Order Survey which was designed to evaluate Webcraft employees experiences in mail order for the 1984 Christmas season. 1200 employees were surveyed with a 27% response.

CONSUMERS WOULD BE MORE LIKELY TO ORDER FROM A CATALOG IF	
THEY COULD USE A CREDIT CARD	23%
THEY COULD PAY OVER A PERIOD OF TIME	23%
THE PRICES WERE LOWER	48%
THEY WERE SENT A RECEIPT OR CONFIRMATION OF ORDER	24%
IT WERE EASIER TO RETURN MERCHANDISE	54%
THEY WERE SURE THEY WOULD GET WHAT THEY EXPECTED	68%
THEY HAD A MONEY-BACK-GUARANTEE	51%
THE OFFER WAS FROM A COMPANY THEY COULD TRUST	45%

CONSUMERS' OVERALL MAIL ORDER EXPERIENCE THIS YEAR

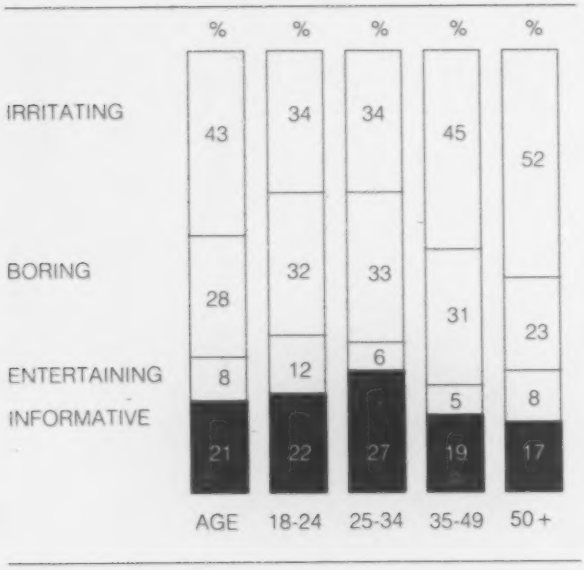
SERVICE	EXCELLENT	VERY GOOD	SATISFACTORY	FAIR	POOR	DOES NOT APPLY
PRODUCT MET MY EXPECTATIONS	32%	44%	20%	4%	1%	0%
PRODUCTS ARRIVED IN GOOD CONDITION	52%	38%	8%	1%	1%	1%
COMPANY GUARANTEES WERE REASSURING	28%	34%	19%	7%	1%	12%
ON-TIME DELIVERY	34%	29%	19%	6%	4%	8%
GIFT MESSAGE INCLUDED AS REQUESTED	12%	10%	8%	1%	2%	66%
COURTEOUS TELEPHONE SERVICE	23%	23%	15%	4%	0%	35%
ORDER FORM WAS EASY TO USE	30%	29%	21%	2%	0%	17%

REASONS FOR SHOPPING THROUGH THE MAIL

SAVES TIME	81%
AVOIDS TRIP TO POST OFFICE	16%
PRICE	28%
IT'S FUN	29%
SELECTION IS BETTER IN CATALOGS	36%
CATALOG COMPANIES CAN MAIL PRODUCTS TO ARRIVE ON TIME ANYWHERE IN THE U.S.A.	20%
RETAIL STORE SERVICE IS UNSATISFACTORY	22%

Source: Webcraft Mail Order Survey, 1985

REACTIONS TO ADVERTISING RECEIVED IN MAIL



Source: Ogilvy & Mather, Inc., 1985

REASONS FOR PURCHASING ITEMS BY MAIL

CAN'T FIND ITEMS ELSEWHERE	62.8%
CONVENIENCE	56.5%
PRICE	29.6%
ENJOY BUYING THROUGH THE MAIL	15.1%
OTHER	0.5%
DO NOT SHOP BY MAIL	7.1%
DON'T KNOW/NO ANSWER	2.6%

Source: Better Homes and Gardens, Consumer Panel, 1984

THE PUBLIC'S NEGATIVE ATTITUDES TOWARDS RETAILING

	AGREE		NEITHER AGREE	DISAGREE	
	STRONGLY	SOMEWHAT	NOR DISAGREE	SOMEWHAT	STRONGLY
STORES FREQUENTLY MISLEAD CONSUMERS BY DEVELOPING DISPLAYS TO MAKE IT LOOK LIKE A PRODUCT IS ON SALE, WHEN IN FACT IT IS NOT	35%	42	10	10	3
WHOLESALERS FREQUENTLY MAKE HIGH PROFITS WHICH SIGNIFICANTLY INCREASE PRICES THAT CONSUMERS PAY	35%	38	16	8	3
ADVERTISERS FREQUENTLY MANIPULATE CONSUMERS BY USING DECEPTIVE CLAIMS	34%	40	16	8	2
SALES PEOPLE FREQUENTLY MISREPRESENT PRODUCTS, RESULTING IN CONSUMERS BUYING UNNECESSARY PRODUCTS	28%	38	16	15	3
A GROCERY STORE OWNER TAKES HOME AT LEAST $3.00 FOR EVERY $10.00 BAG OF GROCERIES SOLD	20%	24	30	15	11
RETAILERS FREQUENTLY ARE UNFAIR IN RESOLVING CONSUMER COMPLAINTS	18%	35	18	22	7

Source: R. H. Bruskin Associates, Inc., 1985

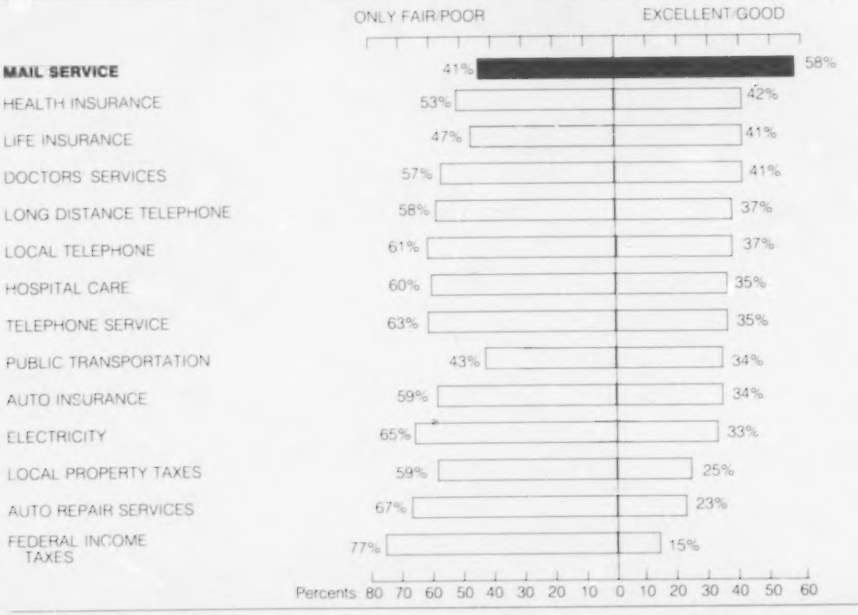
TYPES AND FREQUENCY OF MAIL ORDER COMPLAINTS

DELIVERY – DELAY/DAMAGE	57.8%
CREDIT/BILLING	13.7
UNSATISFACTORY SERVICE*	11.8
FAILURE TO PROVIDE REFUNDS	10.9
SELLING PRACTICES	2.0
PRODUCT QUALITY/PERFORMANCE	1.7
ADVERTISING PRACTICES	1.1
GUARANTEE/WARRANTY	.6
UNSATISFACTORY REPAIR	.3
DISCONTINUED BUSINESS	.1

*Unrelated to repair

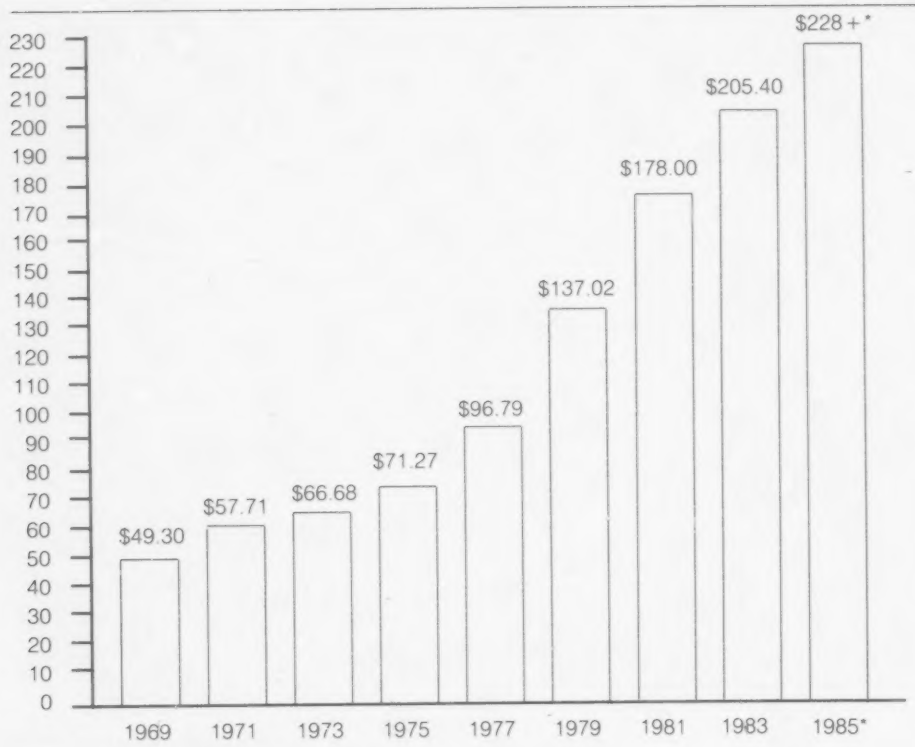
Source: Council of Better Business Bureaus, Inc., 1985

PUBLIC PERCEPTION OF VALUE RECEIVED FOR THE DOLLAR



Source: Roper Report, July, 1985

COST OF AN INDUSTRIAL SALES CALL



*This 1985 figure is a DMA estimate, since McGraw-Hill's research has not been completed as of this publication date.

Source: McGraw-Hill Research Laboratory of Advertising Performance 1969-1983

BUSINESS PRODUCTS AND SERVICES

	1984 MAIL ORDER SALES ($MM'S)	# BUSINESSES	% OF MAIL ORDER SALES
A. BUSINESS SUPPLIES:			
BUSINESS SUPPLIES: DATA PROCESSING ORIENTED	600	20	2
COMPUTER SOFTWARE	760	—	2
BUSINESS SUPPLIES FULL LINE	320	70	1
BUSINESS FORMS: FULL LINE	240	20	1
STATIONERY SPECIALTIES: NON-PROFESSIONAL	220	50	1
OFFICE ADVERTISING SPECIALTIES/ EXECUTIVE GIFTS	150	100	0
OFFICE EQUIPMENT SPECIALTIES: APPLIANCE/MACHINES/FILING	160	50	1
OFFICE FURNITURE	100	20	0
BUSINESS SPECIALTIES: LIBRARIES & SCHOOLS	85	20	0
STATIONERY/EQUIPMENT SPECIALTIES: PROFESSIONAL	115	40	0
OFFICE SPECIALTIES: SCHEDULING/RECORDKEEPING SYSTEMS	85	20	0
ART/DRAFTING/PRINTING SUPPLIES	65	80	0
TOTAL	2,900	390	9
B. BUSINESS SERVICES			
INFORMATION	1,500	30	6
COMMUNICATIONS	780	10	3
TRADE PUBLICATION SUBSCRIPTIONS	500	—	2
AIR FREIGHT	570	10	2
MAILING LIST SERVICES	350	—	1
TOTAL	3,700	50+	12
C. INDUSTRIAL			
INDUSTRY/FUNCTIONAL SPECIFIC	615	170	2
INDUSTRIAL MAINTENANCE/ MATERIALS HANDLING	445	40	1
MEDICAL/PHARMACEUTICAL	160	50	1
TOTAL	1,220	260	4
D. GENERALIZED MAIL ORDER MARKETERS	23,800	—	75
(Mail Order as part of the overall selling channel mix of multichannel industrial marketers not specializing in mail order selling)			
TOTAL BUSINESS PRODUCTS AND SERVICES	31,620		100

Source: Arnold Fishman, Marketing Logistics, 1985

OFFICE PRODUCTS—SALES AND GROWTH RATES[1]

	MANUFACTURER'S SHIPMENTS ($ MILLIONS)						COMPOUNDED ANNUAL GROWN RATES	
	1972	1977	1978	1979	1980	1981	1972-1980	1977-1980
FURNITURE—TOTAL	2,852	5,118	5,860	6,703	7,455	—	12.8	13.3
WOOD FURNITURE	250	612	712	1,023	1,035	—	19.4	19.1
METAL FURNITURE	861	1,397	1,632	1,818	2,224	—	12.6	16.7
PUBLIC BUILDING FURNITURE	235	787	851	1,048	1,122	—	21.6	12.5
PARTITIONS AND FIXTURES	1,506	2,322	2,665	2,814	3,074	—	9.3	9.8
OFFICE MACHINES—TOTAL	8,652	17,053	21,672	27,416	33,579	—	18.5	25.3
ELECTRONIC COMPUTING EQUIPMENT	6,710	12,920	16,560	21,470	26,590	—	19.3	27.2
CALCULATORS—TOTAL	637	850	1,063	1,302	1,518	—	11.5	21.3
TYPEWRITERS	381	1,028	1,341	1,575	1,865	2,182	22.0	21.9
OFFICE MAILING EQUIPMENT	117	235	286	313	360	404	15.1	15.3
OTHER BUSINESS MACHINES	1,047	2,020	2,422	2,756	3,246	—	15.2	17.1
[2]PHOTOCOPY EQUIPMENT	—	—	—	—	3,165	—	—	—
TOTAL INCLUDING PHOTOCOPY EQUIPMENT	—	—	—	—	36,744	—	—	—
OFFICE SUPPLIES—PARTIAL TOTAL	3,380	5,884	6,644	7,796	8,657	—	12.5	13.7
BUSINESS FORMS	1,382	2,703	3,077	3,749	4,151	—	14.7	15.4
ENVELOPES	621	991	1,121	1,304	1,460	—	11.3	13.8
STATIONERY AND TABLETS	450	652	747	766	836	—	8.0	8.6
WRITING EQUIPMENT	927	1,538	1,699	1,977	2,210	—	11.5	12.8
GRAND TOTAL	14,884	28,055	34,176	41,915	49,691	—	16.3	21.0

Sources: [1]—"Annual Survey of Manufactuers: General Statistics For Industry Groups And Industries: Value of Product Shipments," U.S. Department of Commerce, Bureau Of Census.
[2]—Fortune, October 18, 1982, p.44

BUSINESS PUBLICATIONS VS. TOTAL ADVERTISING GROWTH

	TOTAL ADVERTISING ($MM'S)	BUSINESS PUBLICATIONS $ AMOUNT ($MM'S)	BUSINESS PUBLICATIONS % OF ($MM'S)
1970	19,550	740	3.8
1971	20,740	720	3.5
1972	23,300	781	3.4
1973	25,120	865	3.4
1974	26,820	900	3.4
1975	28,160	919	3.3
1976	33,690	1,035	3.1
1977	37,920	1,221	3.2
1978	43,970	1,400	3.2
1979	49,840	1,595	3.2
1980	54,480	1,674	3.1
1981	61,320	1,841	3.0
1982	66,580	1,879	2.8
1983	75,060	1,876	2.5
1984 (FORECAST)	85,400	2,270	2.7
ANNUAL % GROWTH:			
1970-1984	11.1	8.0	
1970-1975	7.6	4.4	
1975-1980	14.1	10.1	
1980-1984	11.9	6.6	

Source: McCann Erickson, 1985

MAJOR FACTORS ACCOUNTING FOR POTENTIAL MAIL ORDER SALES GROWTH

	TOTAL SAMPLE		TYPE OF COMPANY				MAIL ORDER SALES SIZE			
			BUSINESS PRODUCTS/ SERVICES		INDUSTRIAL PRODUCTS		LESS THAN $2.5 MM		$2.5 MM +	
	#	%	#	%	#	%	#	%	#	%
TOTAL IN SAMPLE	92	100	57	100	35	100	37	100	36	100
TOTAL RESPONDING	89	97	55	96	34	97	35	95	36	100
GENERAL CATEGORY GROWTH	24	26	17	30	7	20	10	27	8	22
INCREASING PERSONAL SELLING EXPENSE	28	30	18	32	10	29	7	19	18	50
INCREASING IN-STORE SELLING	11	12	5	9	6	17	4	11	5	14
INADEQUATE IN-STORE SELLING	1	1			1	3			1	3
GENERAL MAIL ORDER GROWTH	47	51	31	54	16	46	20	54	22	61
STILL UNTAPPED CUSTOMER BASE RESOURCES	24	26	14	25	10	29	10	27	8	22
MAIL ORDER PRODUCT LINE OPPORTUNITIES	22	24	13	23	9	26	7	19	12	33
MAIL ORDER MERCHANDISING (PRODUCT PROMOTIONAL OPPORTUNITIE)S	31	34	19	33	12	34	15	41	14	39
MAIL ORDER CUSTOMER SERVICE OPPORTUNITIES	19	21	14	25	5	14	7	19	10	28
MICROCOMPUTER TECHNOLOGY	1	1	1	2					1	3
MAIL ORDER MEDIA OPPORTUNITIES	49	53	30	53	19	54	13	35	27	75
CATALOG	42	46	25	44	17	49	10	27	24	67
OTHER DIRECT MAIL	22	24	13	23	9	26	3	8	15	42
SPACE	8	9	7	12	1	3	2	5	4	11
TELEPHONE—OUTBOUND	17	18	12	21	5	14	1	3	12	33
TELEPHONE—INBOUND	19	21	13	23	6	17	2	5	13	36
BROADCAST—TV	1	1			1	3			1	3
BROADCAST—CABLE	4	4	2	4	2	6	2	5	2	1
OTHER	2	2	2	4	-				1	3
NO RESPONSE	3	3	2	4	1	3	2	5		
TOTAL RESPONSE	372	402	236	414	136	389	113	305	198	550

MAJOR FACTORS LIMITING MAIL ORDER SALES GROWTH

	TOTAL SAMPLE		TYPE OF COMPANY				MAIL ORDER SALES SIZE			
			BUSINESS PRODUCTS/ SERVICES		INDUSTRIAL PRODUCTS		LESS THAN $2.5 MM		$2.5 MM–	
	#	%	#	%	#	%	#	%	#	%
TOTAL IN SAMPLE	92	100	57	100	35	100	37	100	36	100
TOTAL RESPONDING	83	90	52	91	31	89	32	86	34	94
GENERAL CATEGORY SLOWDOWN	8	9	6	11	2	6	1	3	5	14
INCREASING PERSONAL SELLING MARKET COVERAGE	4	4	2	4	2	6	6	16	4	11
INCREASING RETAIL STORE COVERAGE	13	14	9	16	4	11	14	38	4	11
INCREASING MAIL ORDER COMPETITIVE SATURATION	38	41	27	47	11	31	6	16	19	53
SATURATED CUSTOMER BASE RESOURCES	19	21	15	26	4	11	2	5	10	28
DECLINING PRODUCT LINE EXPANSION OPPORTUNITIES	8	9	6	11	2	6	18	49	5	14
INCREASING PROMOTIONAL COST	39	42	26	46	13	37	7	20	16	44
INCREASING FULFILLMENT COSTS	16	17	12	21	4	11	1	3	7	19
ECONOMY SLOWDOWN	2	2	1	2	1	3	1	3		
EDUCATIONAL BUDGET CUTBACKS	1	1	1	2						
MAIL ORDER PRICE COMPETITION	1	1			1	3			1	3
COST OF ORDERS	1	1	1	2			1	3		
UNSATISFACTORY SUPPLIER SERVICE	1	1	1	2						
MAIL ORDER SERVICING LIMITATIONS	1	1			1	3			1	3
NONE	3	3	1	2	2	6				
NO RESPONSE	9	10	5	9	4	11	5	14	2	6
TOTAL RESPONSE	155	168	108	189	47	134	57	154	73	203

Source: "Business to Business Mail Order Marketing Study Survey." Mail Order Marketing Management Library, December 1983

AVERAGE NUMBER OF BUSINESS MAILINGS RECEIVED PER WEEK

NUMBER OF PIECES PER WEEK	
0–10	19%
11–20	15
21–30	26
31–40	4
41–50	7
51–75	7
75+	15
AVERAGE	44

PERCENTAGE OF BUSINESS MAIL UNSOLICITED

PERCENTAGE UNSOLICITED	
0–20	7%
21–40	11
41–60	11
61–80	26
81–100	44
AVERAGE	70%

Source: Stephan Direct, Inc. 1985

The following information is from an April, 1985 mailing to Panel B, 500 nationally distributed members of the 1,000 member "Better Homes & Gardens" Consumer Panel. 416 completed questionnaires (83.2% response) were tabulated.

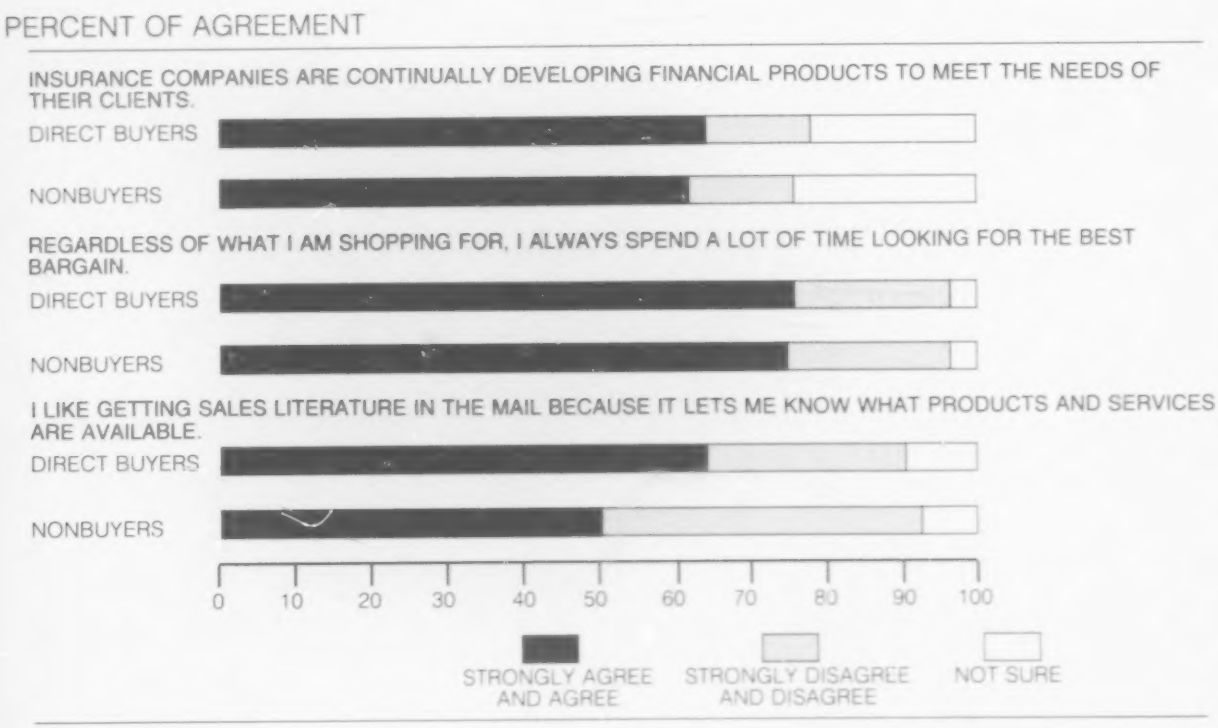
CONSUMERS LEARN MOST ABOUT FINANCIAL SERVICES/PRODUCTS FROM. . .

	TOTAL
MAGAZINE ARTICLES	38.7
FRIENDS/RELATIVES/ CO-WORKERS	36.5
MATERIALS THAT ARE SENT TO MY HOME FROM VARIOUS FINANCIAL SERVICE COMPANIES	34.4
NEWSPAPER ARTICLES	33.2
TELEVISION ADS	29.3
FINANCIAL SERVICE REPRESENTATIVE/AGENT	25.0
TELEVISION PROGRAMS	23.6
NEWSPAPER ADS	13.7
MAGAZINE ADS	13.2
OTHER	4.6
NO ANSWER	7.9

Source: Better Homes and Gardens Consumer Panel B, April, 1985

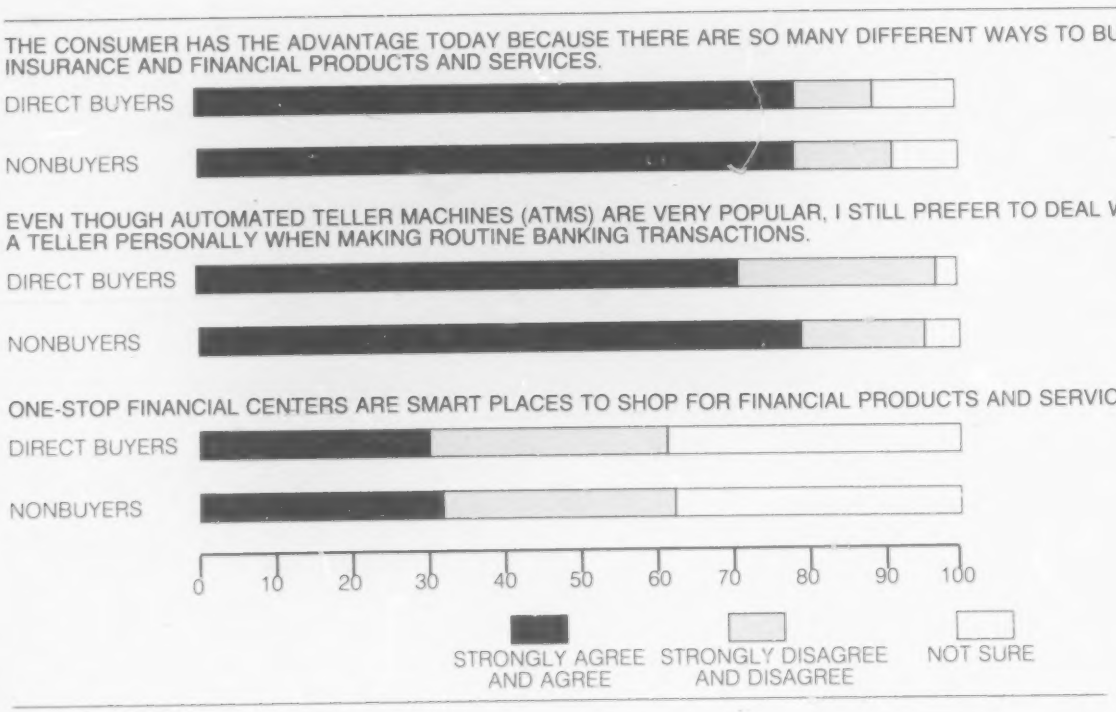
To shed some light on the characteristics of direct response marketing of insurance and investment, the Life Insurance Marketing Research Association (LIMRA) surveyed U.S. approximately 1,800 households in October 1984. This report focuses on the financial attitudes and practices of households that have purchased directly compared with those that have not. It provides a description of the emerging direct response consumer market and offers recommendations on marketing to this group.

FINANCIAL SERVICES PRODUCT AND SHOPPING ATTITUDES


PERCENT OF AGREEMENT
INSURANCE COMPANIES ARE CONTINUALLY DEVELOPING FINANCIAL PRODUCTS TO MEET THE NEEDS OF THEIR CLIENTS.
DIRECT BUYERS
NONBUYERS
REGARDLESS OF WHAT I AM SHOPPING FOR, I ALWAYS SPEND A LOT OF TIME LOOKING FOR THE BEST BARGAIN.
DIRECT BUYERS
NONBUYERS
I LIKE GETTING SALES LITERATURE IN THE MAIL BECAUSE IT LETS ME KNOW WHAT PRODUCTS AND SERVICES ARE AVAILABLE.
DIRECT BUYERS
NONBUYERS
0 10 20 30 40 50 60 70 80 90 100
STRONGLY AGREE AND AGREE
STRONGLY DISAGREE AND DISAGREE
NOT SURE

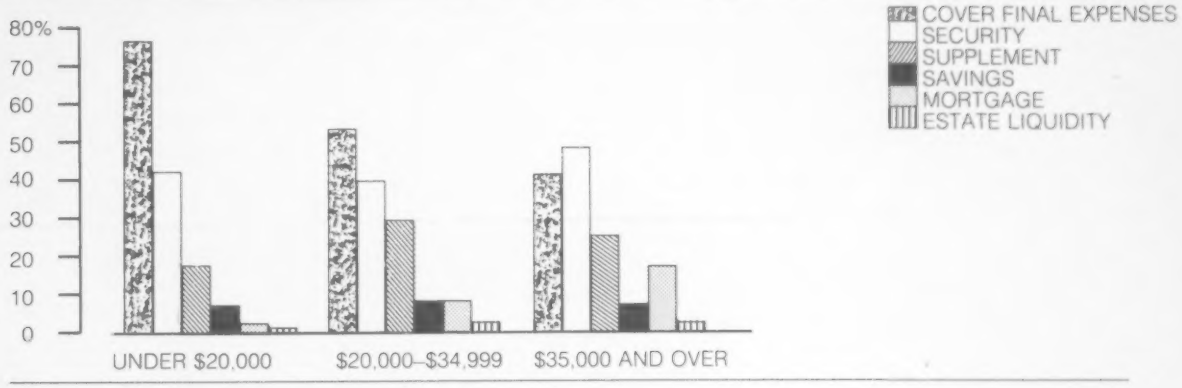
Source: Life Insurance Marketing Research Association, 1985

CONSUMER ATTITUDES TOWARDS THE FINANCIAL SERVICES INDUSTRY
PERCENT OF AGREEMENT

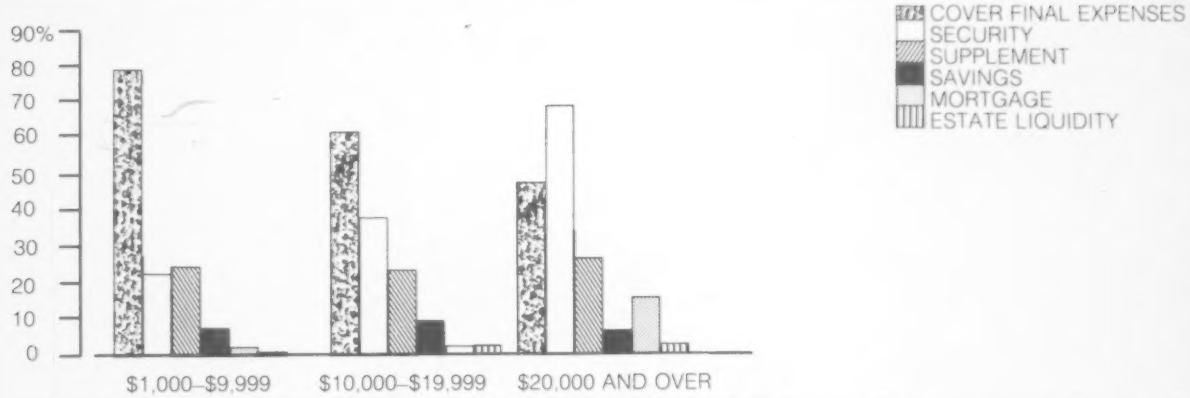

THE CONSUMER HAS THE ADVANTAGE TODAY BECAUSE THERE ARE SO MANY DIFFERENT WAYS TO BUY INSURANCE AND FINANCIAL PRODUCTS AND SERVICES.
DIRECT BUYERS
NONBUYERS
EVEN THOUGH AUTOMATED TELLER MACHINES (ATMS) ARE VERY POPULAR, I STILL PREFER TO DEAL WITH A TELLER PERSONALLY WHEN MAKING ROUTINE BANKING TRANSACTIONS.
DIRECT BUYERS
NONBUYERS
ONE-STOP FINANCIAL CENTERS ARE SMART PLACES TO SHOP FOR FINANCIAL PRODUCTS AND SERVICES.
DIRECT BUYERS
NONBUYERS
0 10 20 30 40 50 60 70 80 90 100
STRONGLY AGREE AND AGREE
STRONGLY DISAGREE AND DISAGREE
NOT SURE

Source: Life Insurance Marketing Research Association, 1985

REASONS FOR DIRECT LIFE PURCHASE
BY HOUSEHOLD INCOME



REASONS FOR DIRECT LIFE PURCHASE
BY POLICY SIZE



TYPES OF INSURANCE COVERAGE HOUSEHOLD CURRENTLY OWNS

	NON-BUYERS	DIRECT BUYERS	DIRECT BUYERS			
			LIFE	HEALTH	P&C	INVEST.
AUTO	90%	93%	90%	90%	97%	96%
HOSPITAL/MEDICAL	87	89	86	86	89	93
LIFE	85	86	98	75	84	86
HOMEOWNERS/RENTERS	84	86	78	85	86	91
ACCIDENTAL DEATH AND DISMEMBERMENT	44	51	58	43	50	54
DISABILITY INCOME	29	36	37	21	37	43
TRAVEL/ACCIDENT	27	39	35	39	34	43
MEDICARE SUPPLEMENTAL	22	27	14	47	25	27
MORTGAGE OR CREDIT LIFE	22	21	29	17	17	17
OTHER	2	3	3	2	3	6
HOUSEHOLDS WITH NONE OF THE ABOVE	2%	+	1%	1%	1%	—

+ Less than 1/2 of 1 percent
– No cases

Source: Life Insurance Marketing Research Association, 1985

FINANCIAL AND INVESTMENT PRODUCTS OWNED OR USED BY HOUSEHOLD

	NON-BUYERS	DIRECT BUYERS	DIRECT BUYERS			
			LIFE	HEALTH	P&C	INVEST.
SAVINGS ACCOUNT	71%	73%	70%	73%	75%	73%
CREDIT UNION SHARE ACCOUNT	28	33	34	23	41	38
CHECKING ACCOUNT, NO INTEREST PAID	53	53	55	52	49	52
CHECKING ACCOUNT, WITH INTEREST PAID	39	47	39	43	48	60
CERTIFICATE OF DEPOSIT (CD)	37	41	29	49	45	49
MONEY MARKET FUND	26	39	25	30	42	80
MUTUAL FUND	10	20	7	12	20	49
COMMON OR PREFFERED STOCK	21	32	22	21	41	58
GOVERNMENT SAVINGS BONDS	24	26	28	22	26	23
CORPORATE BONDS	3	6	3	5	7	15
STATE OR MUNICIPAL BONDS	4	7	3	4	9	19
LIMITED PARTNERSHIP TAX SHELTER	3	5	3	2	4	11
OTHER	2	4	4	3	3	4
HOUSEHOLDS WITH NONE OF THE ABOVE	5%	3%	6%	3%	2%	—

– No cases

MOST RECENT DIRECT LIFE PURCHASE: TYPE OF POLICY

	PERCENT
WHOLE LIFE	35%
TERM LIFE	54
COMBINATION WHOLE LIFE/TERM	7
UNIVERSAL LIFE	2
OTHER	2
	100%

MOST RECENT DIRECT WHOLE LIFE AND TERM PURCHASES: COVERAGE AND PREMIUM

TERM LIFE		
QUARTILES	AMOUNT OF COVERAGE	ANNUAL PAID PREMIUM
75%	$50,000	$168
50	20,000	95
25	10,000	40

WHOLE LIFE		
QUARTILES	AMOUNT OF COVERAGE	ANNUAL PAID PREMIUM
75%	$10,000	$168
50	6,000	81
25	3,625	30

Source: Life Insurance Marketing Research Association, 1985

NUMBER OF LIFE INSURANCE POLICIES THAT HOUSEHOLDS BOUGHT DIRECTLY

	PERCENT
ONE	52%
TWO	29
THREE OR MORE	19
	100%

ATTENTION PAID TO SALES LITERATURE ON INSURANCE AND INVESTMENTS

	NONBUYERS	DIRECT BUYERS
READ THOROUGHLY ALL OR MOST	6%	14%
READ SELECTED PIECES	20	27
GLANCE AT ALL	54	52
THROW MOST AWAY UNOPENED	20	7
SOMEONE ELSE SCREENS MAIL	+	–
	100%	100%

+ Less than 1/2 of 1 percent
– No cases

NUMBER OF FINANCIAL SERVICES SALES PIECES RECEIVED IN THE PAST MONTH

	NONBUYERS	DIRECT BUYERS
NONE	26%	13%
1 OR 2	25	26
3 TO 5	32	32
6 OR MORE	14	26
DO NOT RECALL	3	3
	100%	100%

Source: Life Insurance Marketing Research Association, 1985

PRIMARY REASON FOR PURCHASING LIFE INSURANCE DIRECTLY RATHER THAN THROUGH AN AGENT

		PERSONAL LIFE AGENT	
	TOTAL	HAVE	DO NOT HAVE
LESS EXPENSIVE	50%	55%	46%
POLICY MEETS NEEDS	13	14	12
CONVENIENT, EASIER	12	10	13
ADVERTISING	7	3	10
COMPANY REPUTATION	6	5	7
ENDORSED BY ASSOCIATION	4	5	4
THROUGH EMPLOYER	4	4	5
OTHER	4	4	3
	100%	100%	100%
ALL DIRECT BUYERS		41%	59%

NUMBER OF DIRECT OFFERS RECEIVED FOR INSURANCE OR FINANCIAL PRODUCTS IN THE PAST MONTH

	NONBUYERS	DIRECT BUYERS
NONE	31%	19%
1 OR 2	28	32
3 TO 5	16	24
6 OR MORE	8	16
DON'T RECALL	17	9
	100%	100%

RECALL OF PRODUCTS OFFERED IN SALES LITERATURE RECEIVED IN THE PAST MONTH

	NONBUYERS	DIRECT BUYERS
INSURANCE		
HOSPITAL/MEDICAL	80%	83%
LIFE	73	75
TRAVEL ACCIDENT	38	50
AUTO	38	45
HOMEOWNERS/RENTERS	16	24
OTHER INSURANCE	2	4
FINANCIAL PRODUCTS AND SERVICES		
INDIVIDUAL RETIREMENT ACCOUNT	24%	28%
OTHER	7	13
CANNOT RECALL PRODUCTS	5%	3%

Source: Life Insurance Marketing Research Association, 1985

IMPORTANT FACTORS IN PURCHASING INSURANCE OR INVESTMENTS DIRECTLY

	NONBUYERS	DIRECT BUYERS
NO AGENT WILL CALL		
HOUSEHOLD HEADS AGED...		
65 AND OVER	39%	40%
50–64	28	46
35–49	27	40
UNDER 35	26	34
ALL HOUSEHOLDS	29%	40%
NO PHYSICAL REQUIRED		
HOUSEHOLD HEADS AGED...		
65 AND OVER	46%	45%
50–64	30	45
35–49	35	34
UNDER 35	28	29
ALL HOUSEHOLDS	34%	39%
TOLL-FREE PHONE NUMBER FOR:		
MAKING PURCHASE	68%	64%
MAKING CLAIMS	81	81
QUESTIONS AND OTHER SERVICES	81	83

PRIMARY ADVANTAGES OF BUYING INSURANCE OR INVESTMENTS DIRECT FROM A COMPANY

	NONBUYERS	DIRECT BUYERS
NONE OR NOT SURE	34%	10%
LESS EXPENSIVE	43	50
NO PRESSURE FROM AGENT	12	18
SAVES TIME/CONVENIENT	5	11
BETTER/MORE CHOICE	4	9
COMPANY'S REPUTATION	1	1
OTHER	1	1
	100%	100%

PRIMARY DISADVANTAGES OF BUYING INSURANCE OR INVESTMENTS DIRECT FROM A COMPANY

	NONBUYERS	DIRECT BUYERS
NONE OR NOT SURE	9%	13%
NO PERSONAL CONTACT/NO AGENT	56	49
MIGHT MISUNDERSTAND POLICY	21	23
CLAIMS A PROBLEM	10	10
MORE EXPENSIVE	1	1
OTHER	3	4
	100%	100%

Source: Life Insurance Marketing Research Association, 1985

CREDIT CARD OWNERSHIP

HAVE CREDIT CARDS	81%
RETAIL CARDS	69%
SEARS	50
JCPENNEY	35
MONTGOMERY WARD	23
OTHER RETAIL CARDS	41
BANK CARDS	57%
VISA	43
VISA (REGULAR)	40
VISA PREMIUM	5
MASTERCARD	35
MASTERCARD (REGULAR)	33
GOLDEN MASTERCARD	3
GASOLINE CREDIT CARDS	35%
TELEPHONE CREDIT CARDS	26%
THIRD PARTY CARDS	13%
AMERICAN EXPRESS	11
AMERICAN EXPRESS GREEN	9
AMERICAN EXPRESS GOLD	3
DINER'S CLUB	2
CARTE BLANCHE	1
AIRLINE CREDIT CARDS	3%
CAR RENTAL CREDIT CARDS	3%
DO NOT HAVE CREDIT CARDS	19%

CHARGE ON CREDIT CARDS IN THE PAST 12 MONTHS

CHARGED ON CREDIT CARDS IN PAST 12 MONTHS	73%
UNDER $1,000	38
UNDER $500	22
$500–$999	16
$1,000–$2,999	23
$1,000–$1,999	15
$2,000–$2,999	8
$3,000 AND OVER	12
$3,000–$4,999	5
$5,000–$9,999	5
$10,000 AND OVER	2
HAVE NOT CHARGED ON CREDIT CARDS IN PAST 12 MONTHS	27%
AVERAGE AMOUNT CHARGED IN PAST 12 MONTHS— TOTAL POPULATION	$1,600
AVERAGE AMOUNT CHARGED IN PAST 12 MONTHS— AMONG THOSE WHO HAVE USED CREDIT CARDS	$1,700

Source: Money Magazine, 1985

INFORMATION

65 NON-PROFIT SECTOR

71 PRINTING

73 USPS

81 DIRECT MARKETING EDUCATION

85 APPENDIX: DIRECT MARKETING CLUBS

ESTIMATED DIRECT MAIL
CHARITABLE CONTRIBUTIONS—1984

	(IN BILLION $)
RELIGION	8.89
EDUCATION	2.52
HEALTH & HOSPITALS	2.61
SOCIAL SERVICES	2.00
ARTS & HUMANITIES	1.16
CIVIC & PUBLIC	.52
OTHER	.86
TOTAL	18.56

Source: American Association of Fund Raising Counsel, Inc., "Giving USA—1985 Annual Report." 1985 based on figures from the USPS Household Mailstream Study

WHETHER VARIOUS ARTS AND NONARTS ORGANIZATIONS ARE BELIEVED TO BE GENERALLY SELF-SUPPORTING OR DEPEND ON CONTRIBUTIONS AND SUPPORT

	SELF-SUPPORTING		DEPEND ON PRIVATE CONTRIBUTIONS		DEPEND ON GOVERNMENT SUPPORT		ALL/BOTH (VOL.)		NOT SURE	
	1984 %	1980 %	1984 %	1980 %	1984 %	1980 %	1984 %	1980 %	1984 %	1980 %
ARTS ORGANIZATIONS										
BALLET OR MODERN DANCE TROUPES	30	34	45	38	5	6	10	11	10	11
THEATER GROUPS	27	34	49	42	6	5	10	10	8	9
OPERA COMPANIES	25	31	48	39	4	6	10	10	13	14
SYMPHONY ORCHESTRAS	24	29	47	41	7	8	11	11	11	11
ART MUSEUMS	9	13	44	37	20	24	16	15	11	11
NONARTS ORGANIZATIONS										
HOSPITALS	27	27	13	15	36	33	18	20	6	5
PUBLIC TENNIS COURTS AND GOLF COURSES	27	24	20	17	40	45	7	7	6	6
BOTANICAL GARDENS	14	18	31	28	28	27	12	11	15	16
ZOOS	13	15	26	21	36	40	17	15	8	9
SCIENCE MUSEUMS	9	11	24	22	41	44	17	13	9	10
HISTORICAL MUSEUMS	8	10	26	23	42	44	15	14	9	9
NATURAL HISTORY MUSEUMS	8	10	26	22	42	43	14	14	10	10
PUBLIC LIBRARIES	6	8	14	13	63	63	11	9	6	7

Source: National Research Center of the Arts, Inc., 1984

DIRECT MAIL FUND RAISING SURVEY FOR ART ORGANIZATIONS

The 1980 reduction of annual grants by the National Endowment for the Arts has realized the importance of using direct mail fund raising for the solicitation of private support. Prior to this survey, no collective information existed to service art administrators' fund raising efforts.

The following information taken from this report not only offers a comprehensive view of direct mail fund raising in art organizations, but relates ideas that may prove beneficial for art administrators when planning donor acquisition campaigns.

The survey was conducted by mail in March, 1985. A questionnaire, along with a cover letter, was sent to 182 art organizations across the country including opera and dance companies, symphony/musical organizations, theaters, presenting organizations and public TV stations. Eighty-seven organizations responded, establishing a response rate of approximately 48%.

TOTAL CONTRIBUTION MADE TO ARTS ORGANIZATIONS BY LOW-LEVEL DONORS THROUGH DIRECT MAIL DONOR ACQUISITION CAMPAIGNS

UNDER $5,000	11%
$ 5,001 – $ 10,000	8%
$ 10,001 – $ 20,000	16%
$ 20,001 – $ 30,000	5%
$ 30,001 – $ 50,000	28%
$ 50,001 – $ 75,000	9%
$ 75,001 – $100,000	3%
$100,001 – $125,000	3%
$125,001 – $150,000	3%
$150,001 – $200,000	3%
$200,001 – $300,000	3%
OVER $300,000	8%

Source: DMA Research Department, 1985

AMOUNT SPENT ON DONOR ACQUISITION CAMPAIGNS
(AMONG ARTS ORGANIZATIONS)

UNDER $5,000	28%
$ 5,001 – $10,000	30%
$10,001 – $20,000	19%
$20,001 – $30,000	9%
$30,001 – $50,000	2%
OVER $50,000	15%

OFFERS INCLUDED IN A "TYPICAL" DIRECT MAIL ACQUISITION CAMPAIGN TO ELICIT DONATIONS

LISTING AS DONOR IN PLAYBILL OR ANNUAL REPORT	75%
INVITATIONS TO PARTIES	72%
PUBLICATIONS	68%
EARLY ACCESS TO TICKETS	43%
INVITATIONS TO OPEN REHEARSALS	40%
PREMIUMS*	39%
PRIORITY SEATING	37%
INVITATIONS TO LECTURES	36%
REDUCED TICKET PRICE/ENTRANCE FEE	33%
FREE TICKETS	32%
DISCOUNT ON PRODUCTS	29%
PRIORITY SUBSCRIPTION	18%
DISCOUNT ON SERVICES	16%
OTHER**	11%

*Premiums mentioned include posters, mugs, albums, tote bags, pens and books.
**Other offers included priority/free parking and free drinks at bar.

Source: DMA Research Department, 1985

SUCCESS OF LISTS FOR ACQUIRING NEW DONORS
(AMONG ARTS ORGANIZATIONS)

	UNSUCCESSFUL 1	2	3	4	VERY SUCCESSFUL 5
IN-HOUSE PROSPECT LIST	1%	6%	25%	31%	38%
EXCHANGED DONOR LIST FROM AN ART ORGANIZATION					
SAME GENRE	8%	13%	30%	37%	11%
DIFFERENT GENRE	15%	29%	39%	13%	3%
EXCHANGED PROSPECT LIST FROM AN ART ORGANIZATION					
SAME GENRE	13%	27%	32%	26%	2%
DIFFERENT GENRE	24%	35%	30%	9%	2%
RENTED LISTS					
MAGAZINE SUBSCRIBERS	50%	15%	31%	2%	2%
CREDIT CARD OWNER	61%	21%	15%	3%	0%
COMPILED LIST BY COMMON INTEREST	30%	34%	19%	13%	4%
MAIL ORDER BUYERS	41%	39%	15%	5%	0%

Source: DMA Research Department, 1985

HOW OFTEN ARTS ORGANIZATIONS MAIL TO THEIR IN-HOUSE PROSPECT LISTS

1 TIME PER YEAR	12%
2 TIMES PER YEAR	42%
3 TIMES PER YEAR	22%
4 TIMES PER YEAR	8%
5 TIMES PER YEAR	19%

HOW ARTS ORGANIZATIONS OBTAIN NEW NAMES FOR THEIR IN-HOUSE PROSPECT LISTS

TICKET SUBSCRIBERS	76%
MAIL ORDER TICKET BUYERS	69%
OTHER*	41%
"WOULD YOU LIKE TO BE ON OUR MAILING LIST" CAMPAIGN	36%
"SIGN UP A FRIEND" CAMPAIGN	28%
OFFER OF FREE PRODUCT/SERVICE	16%

* Other sources include: gift shop purchases, window sales, new residents from the chamber of commerce, visitor guest book, board member suggestions and lists from other art organization events or annual reports.

AVERAGE GIFT RECEIVED FROM DONOR ACQUISITION CAMPAIGNS

UNDER $25	15%
$26 – $29	39%
$50	14%
$51 – $99	15%
$100 AND OVER	17%

NUMBER OF ACQUISITION APPEALS SENT PER YEAR TO ACQUIRE NEW DONORS
AMONG ARTS ORGANIZATIONS

1 APPEAL PER YEAR	16%
2 APPEALS PER YEAR	42%
3 APPEALS PER YEAR	21%
4 APPEALS PER YEAR	12%
5 OR MORE APPEALS PER YEAR	9%

MOST IMPORTANT ELEMENT OF A DIRECT MAIL DONOR ACQUISITION CAMPAIGN
AMONG ARTS ORGANIZATIONS

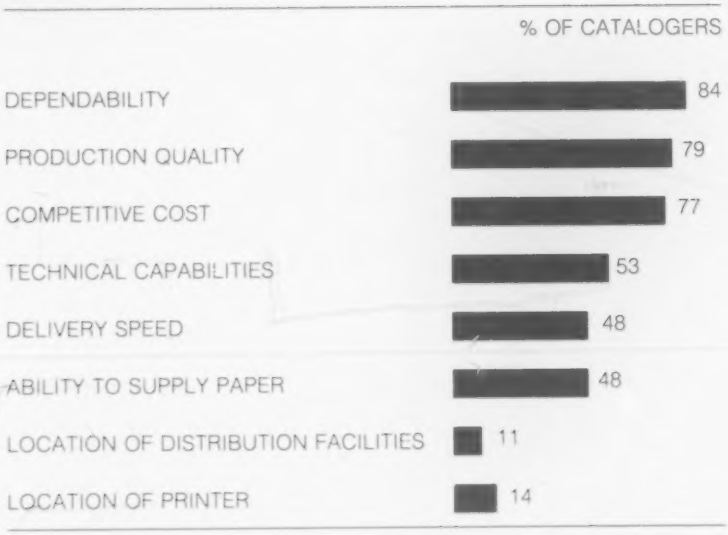
LIST	74%
PACKAGE	12%
OFFER	11%
OTHER	4%

ARTS ORGANIZATIONS' USE OF DIRECT MAIL
NUMBER OF YEARS

1–4 YEARS	28%
5–10 YEARS	48%
11–15 YEARS	10%
16 AND ABOVE	14%

Source: DMA Research Department, 1985

CHOOSING A PRINTER: FACTORS RATED 'VERY IMPORTANT' BY CATALOG PRINT BUYERS



FREQUENCY WITH WHICH CATALOG PRINT BUYERS REVIEW PRINTING CONTRACTS

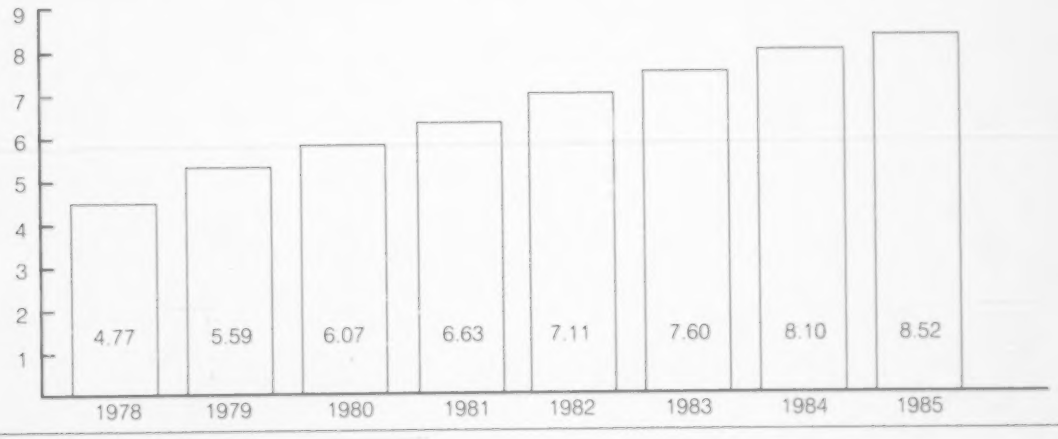
	# of CATALOGERS	% OF CATALOGERS
SEMI-ANNUALLY	45	24
BIANNUALLY	12	6
ANNUALLY	83	44
EVERY TWO YEARS	4	2
EVERY THREE YEARS	3	2
EVERY FOUR YEARS	—	—
EVERY FIVE YEARS	2	1
MORE THAN FIVE YEARS	—	—
CONSTANTLY	9	5
WHEN CONTRACT HAS ENDED	1	1
AS NEEDED	9	5
NOT AT ALL	3	2
ALL OTHER	17	9
NO ANSWER	3	2
TOTAL	189	100

Source: Mid Continent Research, Inc. survey for The Webb Company, 1985

COST OF AVERAGE BUSINESS LETTER

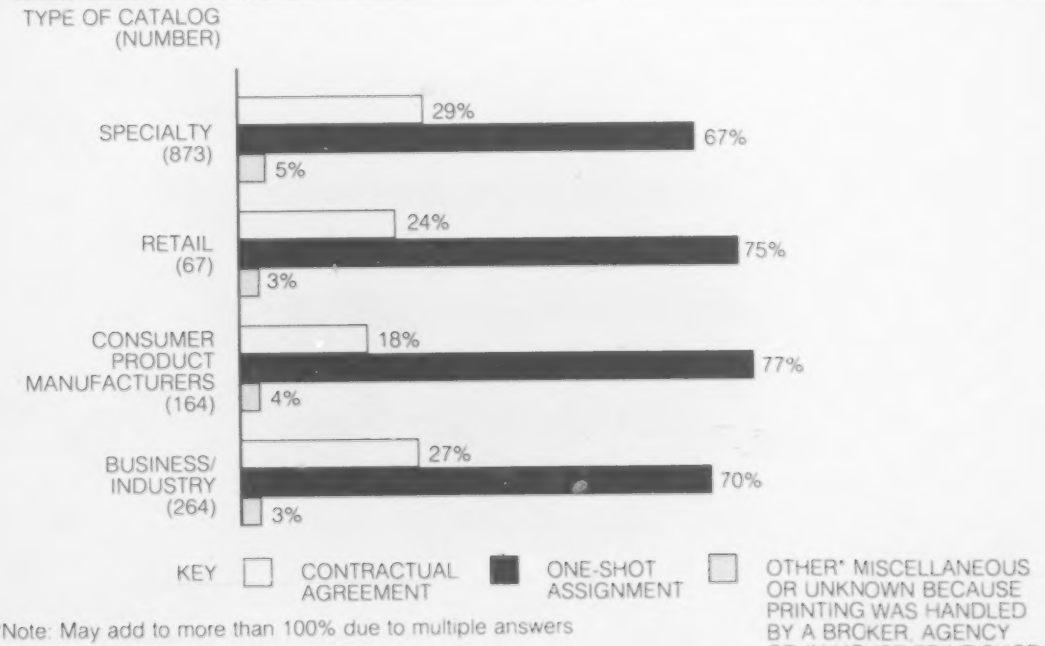
The cost of an "average" business letter increased to $8.52 in 1985, a modest 5% jump over the $8.10 recorded for 1984. This current figure, established by the Dartnell Institute of Business Research, represents the smallest annual percentage rise during the past decade, perhaps signalling a slowing of the 6% to 11% increases seen yearly since 1975.

The slowdown of the letter cost was accomplished despite salary increases of 8.1% (average) for the directors (middle managers) and a 6% increase for secretaries. Add to this a rise in first class postage from 20¢ to 22¢ early this year, and a minimal increase in materials cost (1¢), and you have the 1985 figure. Fixed charges and nonproductive labor costs go up with the participants salaries.



Source: Dartnell Institute of Business Research, 1985

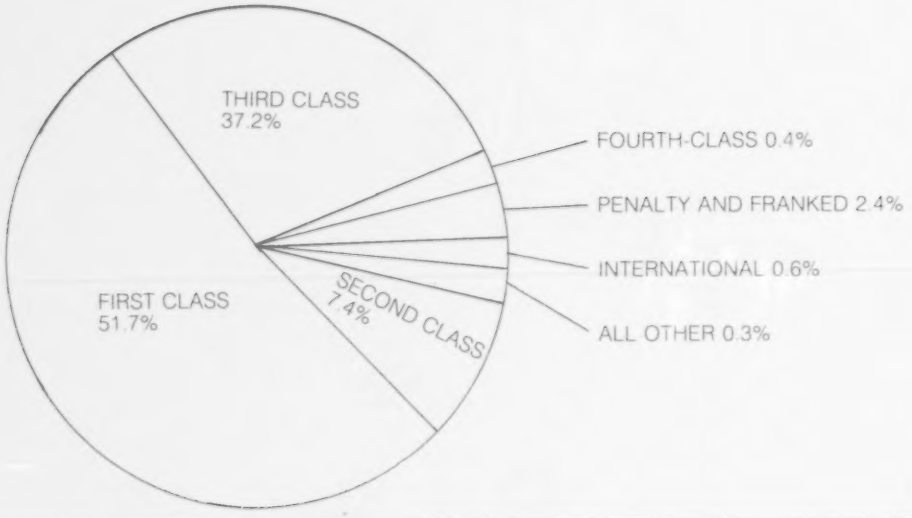
TYPE OF PRINTING AGREEMENTS



*Note: May add to more than 100% due to multiple answers

Source: Strategic Futures, Inc. 1985
Reprinted from "Ca[illegible] Age"

COMPOSITION OF MAIL



PIECES OF MAIL
(IN BILLIONS)

MAIL CLASSIFICATION	1985	1984	PERCENT CHANGE
FIRST-CLASS	72.44	68.43	5.9
SECOND-CLASS	10.38	9.52	9.0
THIRD-CLASS	52.17	48.25	8.1
FOURTH-CLASS	0.58	0.60	−3.9
PENALTY AND FRANKED	3.29	3.45	−4.5
INTERNATIONAL	0.83	0.89	−7.3
ALL OTHER	0.41	0.40	2.0
TOTAL MAIL	140.10	131.54	6.5

Source: Annual Report of the Postmaster General, 1985

NUMBER OF PIECES OF MAIL ATTRIBUTED TO DIRECT MAIL

1977-1985 (*POSTAL FISCAL YEAR*—OCT. 1–SEPT. 30)
BASED ON DMA'S POSTAL VOLUME FORMULA AND U.S. POSTAL SERVICE REVENUE AND COST ANALYSIS REPORTS
(IN THOUSANDS)

	First Class D.Mail = 20%	Priority Mail D.Mail = 5%	Mailgrams D.Mail = 15%	Third Class Single D.Mail = 95%	Third Class Bulk D.Mail = 95%	Third Class Non-Profit D.Mail = 95%	Catalog D.Mail = 100%	Int'l Mail D.Mail = 5%	Total # Pieces	Total # D.Mail Volume Pieces
1977	58,827,034	199,487	28,562	612,518	17,138,794	6,825,799	84,998	684,899	79,402,091	34,247,163
	10,765,407	9,974	4,284	581,892	16,281,854	6,484,509	84,998	34,245		

	First Class D.Mail = 10%	Priority Mail D.Mail = 5%	Mailgrams D.Mail = 95%	Third Class Single D.Mail = 95%	Third Class Bulk D.Mail = 95%	Third Class Non-Profit D.Mail = 95%	Catalog D.Mail = 100%	Int'l Mail D.Mail = 5%	Total # Pieces	Total # D.Mail Volume Pieces
1978	54,557,218	213,329	32,504	539,724	18,684,430	7,020,146	85,431	718,935	81,851,717	30,524,728
	5,455,722	10,666	4,876	512,738	17,750,209	6,669,139	85,431	35,947		

	First Class D.Mail = 10%	Priority Mail D.Mail = 5%	Mailgrams D.Mail = 15%	Third Class Single D.Mail = 95%	Third Class Bulk-Regular D.Mail = 95%	Third Class Bulk-Carrier Presort D.Mail = 95%	Third Class Non-Profit D.Mail = 95%	Catalog* D.Mail = 100%	Int'l Mail D.Mail = 5%	Total # Pieces	Total # D.Mail Volume Pieces
1979	58,215,317	231,835	37,989	444,871	15,509,303	4,492,980	7,552,602	104,087	755,674	87,344,658	37,580,461
	5,831,532	11,592	5,698	422,627	14,733,838	4,268,331	7,174,972	104,087	37,784		
1980	58,993,087	252,864	39,452	410,959	14,583,864	6,999,788	8,068,948	116,434	733,832	90,199,228	34,514,743
	5,899,309	12,643	5,918	390,411	13,854,671	6,649,799	7,665,500		36,692		

	First Class D.Mail = 10%	Third Class Single D.Mail = 95%	Third Class Bulk-Regular D.Mail = 95%	Third Class Bulk-Carrier Presort D.Mail = 95%	Third Class 5-Digit Presort D.Mail = 95%	Third Class Non-Profit D.Mail = 95%	Fourth Class Bound Printed Matter D.Mail = 85%	Int'l Mail D.Mail = 5%	Total # Pieces	Total # D.Mail Volume Pieces
1981	61,410,172	335,168	11,636,430	10,541,579	2,527,621	8,566,607	118,675	885,509	96,021,761	38,207,266
	6,141,017	318,410	11,054,608	10,014,500	2,401,239	8,138,277	94,940	44,275		

	First Class D.Mail = 7.5%	Third Class Single D.Mail = 95%	Third Class Bulk-Regular D.Mail = 95%	Third Class Bulk-Carrier Presort D.Mail = 95%	Third Class 5-Digit Presort D.Mail = 95%	Third Class Non-Profit D.Mail = 95%	Fourth Class Bound Printed Matter D.Mail = 85%	Int'l Mail D.Mail = 2%	Total # Pieces	Total # D.Mail Volume Pieces
1982	62,200,212	203,350	8,791,167	13,742,551	4,918,628	9,063,627	156,154	927,541	100,003,230	39,691,848
	4,665,016	198,183	8,351,609	13,055,423	4,672,697	8,610,446	124,923	18,551		
1983	64,246,880	167,990	8,812,930	16,698,070	5,674,653	9,381,076	168,128	904,821	106,054,548	43,677,504
	4,818,516	159,591	8,372,284	15,863,167	5,390,920	8,912,022	142,908	18,096		
1984	68,428,570	178,316	9,559,199	21,391,900	6,747,731	10,371,568	194,760	894,840	117,766,884	51,151,864
	5,132,143	169,400	9,081,239	20,322,305	6,410,344	9,852,990	165,546	17,897		
1985	72,440,277	168,355	10,428,865	23,407,236	7,189,668	10,976,133	212,829	829,404	130,652,767	55,567,258
	5,808,021	159,937	9,907,422	22,236,874	6,830,185	10,427,326	180,905	16,588		

Note: Priority Mail and Mailgram figures are not reported in the most current years because the volume of dm pieces is not a substantial portion.

*In 1981 the USPS discontinued reporting the catalog figure as a separate category. Since then this figure has been included in the third class mail figures.

VOLUME OF THIRD CLASS MAIL

(POSTAL FISCAL YEAR: OCT. 1–SEPT. 30)

MAIL CLASSIFICATION	1984 # PIECES	1983-1984 % CHANGE	1985 # PIECES	1984-1985 % CHANGE
SINGLE PIECE	178,316,000	+ 6.1	168,355,000	-5.6
NONPROFIT	10,371,568,000	+10.6	10,976,133,000	+5.8
REGULAR BULK	37,698,830,000	+20.9	41,025,769,000	+8.8
TOTAL	48,248,714,000	+18.5	52,170,257,000	+8.1

Source: Direct Marketing Association, "USPS Revenue and Cost Analysis Report," 1985

PRC RECOMMENDED BRM RATE INCREASES

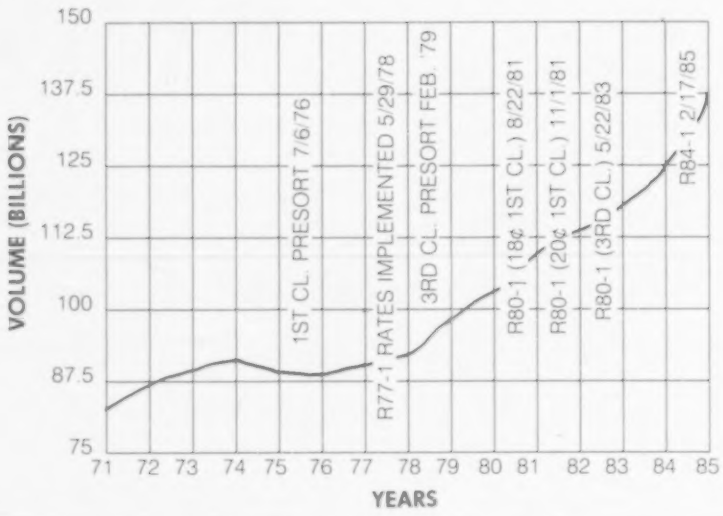
PRC - POSTAL RATE COMMISSION
BRM - BUSINESS REPLY MAIL

	PREVIOUS FEES (DOLLARS)	CURRENT FEES (DOLLARS)
ADVANCE DEPOSIT ACCOUNTS		
ACCOUNTING FEE (PER CALENDAR YEAR)	75.00	160.00
BRM PERMIT FEE (PER CALENDAR YEAR)	40.00	50.00
PER PIECE SURCHARGE	0.05	0.07
TOTAL PER PIECE CHARGE:		
ONE OUNCE LETTERS	0.25	0.29
CARDS	0.18	0.21
NON ADVANCE DEPOSIT ACCOUNTS		
BRM PERMIT FEE	40.00	50.00
PER PIECE SURCHARGE	0.18	0.23
TOTAL PER PIECE CHARGE:		
ONE OUNCE LETTERS	0.38	0.45
CARDS	0.31	0.37

Source: Postal Rate Commission 1985

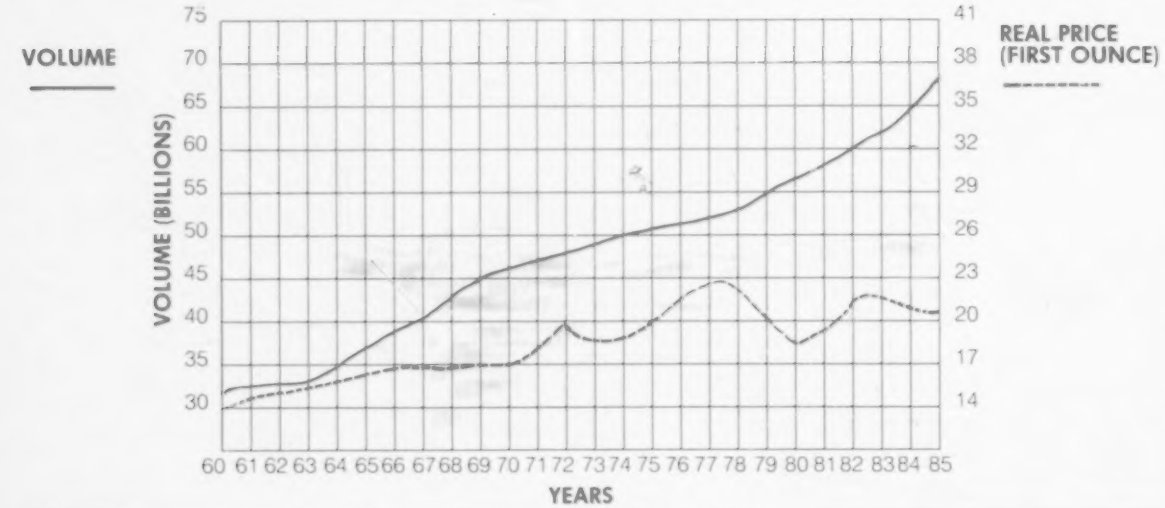
DOMESTIC MAIL VOLUME
FY 1971 THRU FY 1985 EST.

This graph shows the total growth of all domestic mail from 1971 through 1984 with significant happenings such as rate increases and the introduction of presort noted. Overall volume appears to remain relatively constant until the introduction of presort in 1976. After presort, volume grew appreciably. Even rate increases seemed to have little effect on the slope of the growth curve after presort.



FIRST-CLASS (LETTERS & SEALED PARCELS)

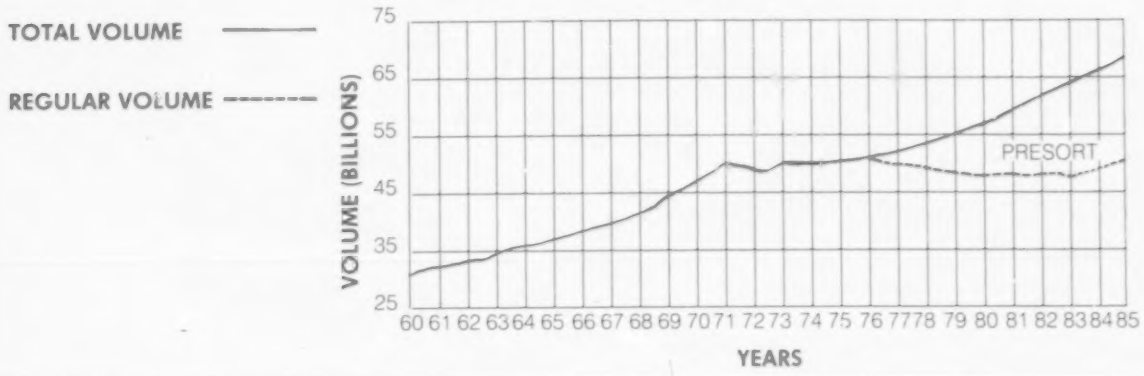
In this graph the solid line indicates first-class letters and sealed parcels, and the broken line indicates the real price of the first ounce using 1985 as a base year. The slope of the growth curve is fairly constant except for a flattening between 1971 and 1976. Real prices flattened out or decreased starting in 1976, then growth resumed its upward path.



Source: Henry Folsom, Vice Chairman, Postal Rate Commission, 1985
Direct Marketing Magazine, 1985

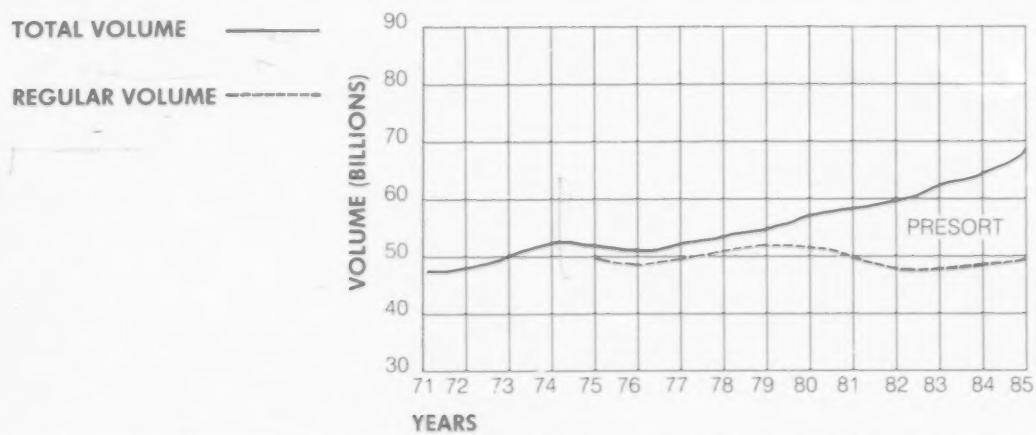
FIRST-CLASS VOLUMES FOR LETTERS & SEALED PARCELS I

In this graph first-class letter and sealed parcel volumes reveal a lack of significant growth from 1971 to 1976. After presort was introduced in 1976, growth continued at about the same rate as before 1971. There were a series of rate increases during that flat period from 1971 to 1976. The rate increases during the flat period and the volume spurt after cheaper presort discount rates infers a relationship between volume and rates or the price paid for postage.



FIRST-CLASS VOLUMES FOR LETTERS & SEALED PARCELS II

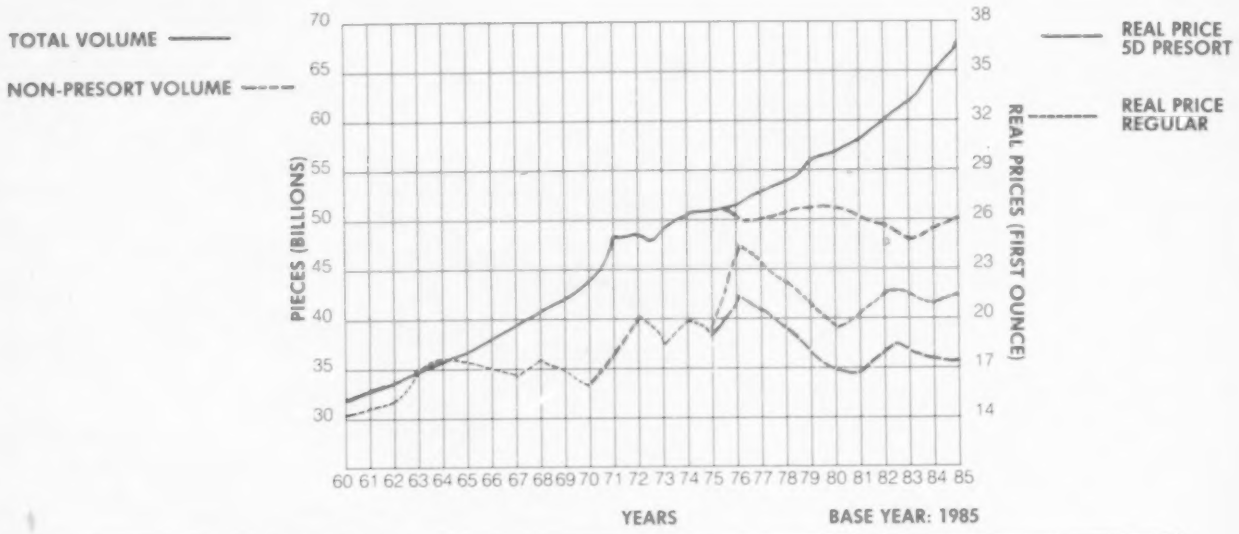
On this graph, presort is separated from non-presort mail. The top line represents the total of all first-class letters and sealed-package volume. The bottom line after 1976 is the volume of non-presorted mail. The difference between the two lines is the amount of five-digit and carrier-route presort mail. The graph shows that big business mailers took advantage of the presort discount and began to presort after 1976. The growth rate increased after presort was introduced so an appreciable amount of the increased volume is new mail.



Source: Henry Folsom, Vice Chairman, Postal Rate Commission, 1985
Direct Marketing Magazine, 1985

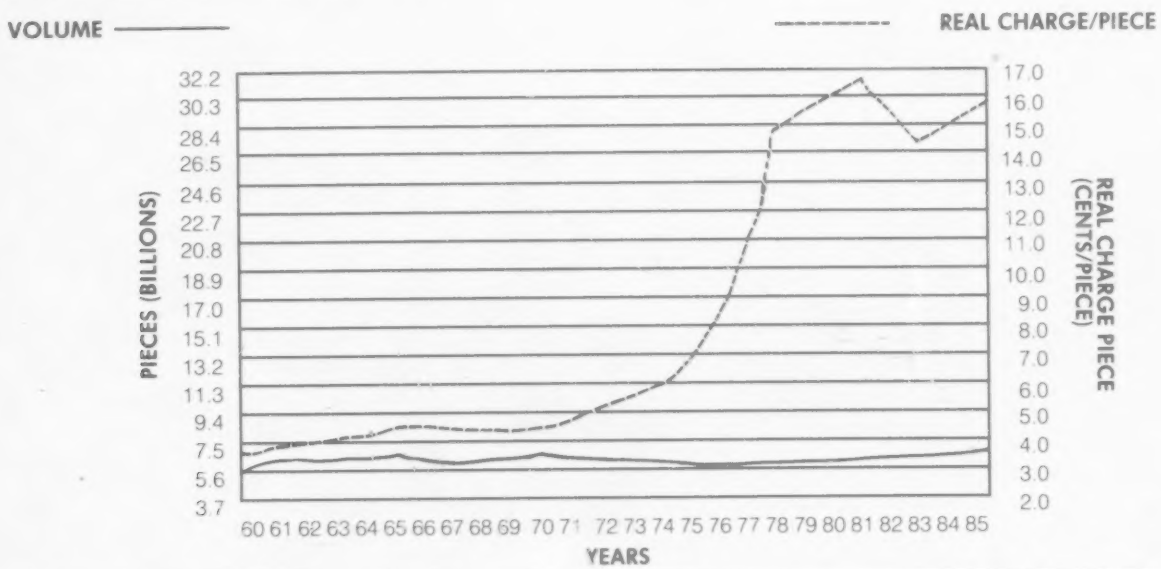
FIRST CLASS VOLUMES FOR LETTERS & SEALED PARCELS III

This graph shows that by separating presort growth and presort real price from non-presort growth and non-presort real prices, there becomes an apparent cause-and-effect between lower prices and higher volumes. The real price of first-class presorted letter and sealed parcels dropped from 22 cents per ounce to 18 cents per ounce from 1976 to 1985. During this same period, total volume increased some 18 billion pieces, and presort climbed from zero to 16 billion pieces.


TOTAL VOLUME
NON-PRESORT VOLUME
REAL PRICE 5D PRESORT
REAL PRICE REGULAR
PIECES (BILLIONS)
70 65 60 55 50 45 40 35 30
REAL PRICES (FIRST OUNCE)
38 35 32 29 26 23 20 17 14
60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85
YEARS
BASE YEAR: 1985

SECOND CLASS REGULAR RATE

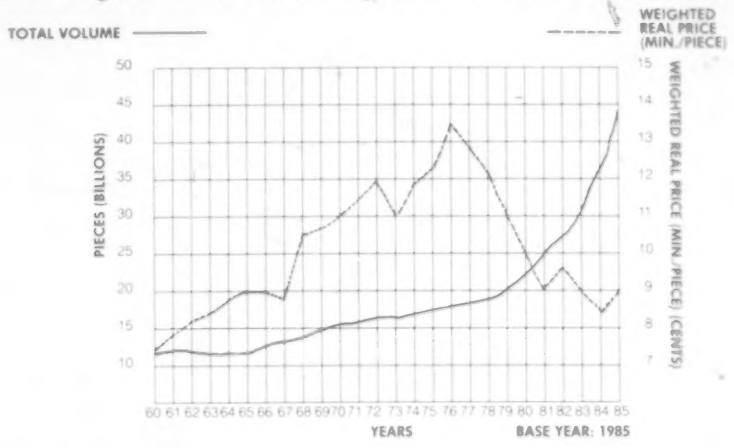
This graph reveals that second-class regular is inelastic. Note that the volume remained almost constant throughout the years while the real price increased steeply.



Source: Henry Folsom, Vice Chairman, Postal Rate Commission, 1985
Direct Marketing Magazine, 1985

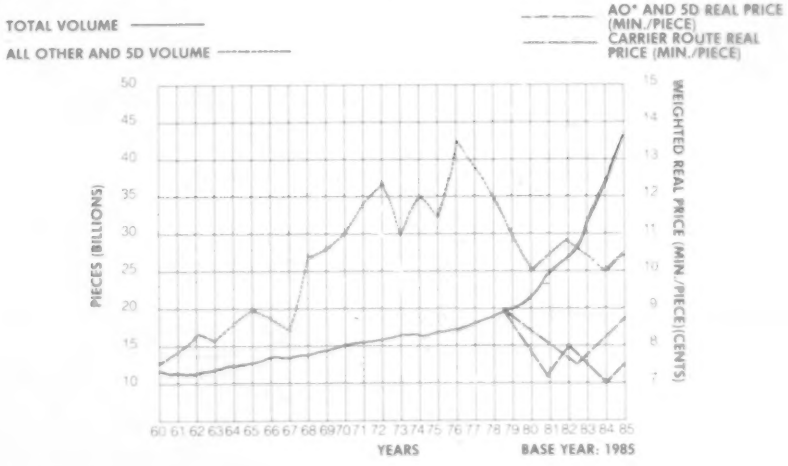
THIRD-CLASS BULK REGULAR I

This graph compares third-class bulk regular volume with its weighted real price. Weighted real price is the price or minimum per-piece rate for all categories of third-class bulk regular mail. Note how volume soared as the weighted price dropped.



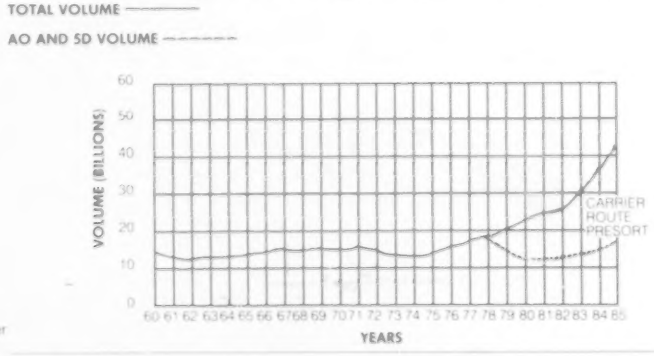
THIRD-CLASS BULK REGULAR II

In this graph, as the real price lines leveled out about 1979, it appears that presort discounts sustained the upward total volume surge.



THIRD-CLASS BULK REGULAR III

This graph shows that there was little growth in third-class bulk regular volume until presort. Growth accelerated dramatically once presort was introduced in 1978. The top line represents the total volume; the dotted line represents all other and five-digit. The numerical difference is the volume of carrier route presorted.



*AO = All Other

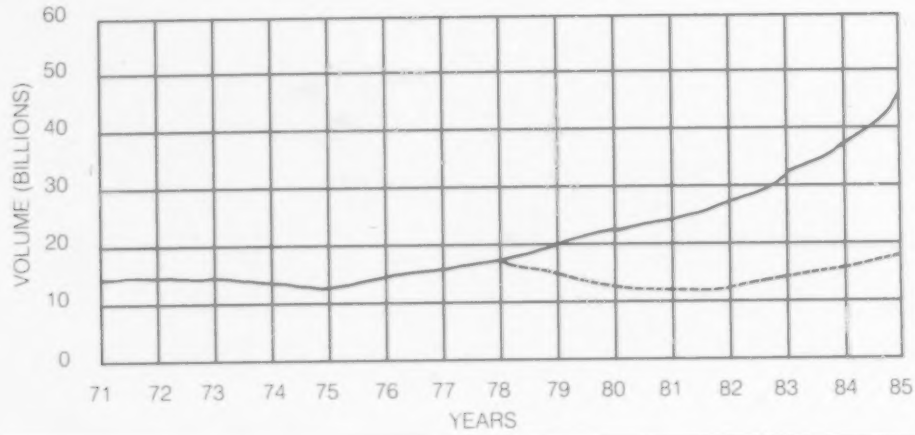
Source: Henry Folsom, Vice Chairman, Postal Rate Commission, 1985
Direct Marketing Magazine, 1985

THIRD-CLASS BULK REGULAR IV

This graph shows the total volume of third-class bulk regular mail and separated third-class bulk "all other and five-digit presort" from 1978 — the year third-class presort discounts were introduced. The top line represents total volume and the bottom line, all other and five-digits. The difference is carrier route presorted third-class bulk regular volume. Third-class bulk regular volume took off dramatically after the presort discount was introduced.

TOTAL VOLUME ————

AO AND 5D VOLUME – – – – – –



THIRD-CLASS BULK NON-PROFIT

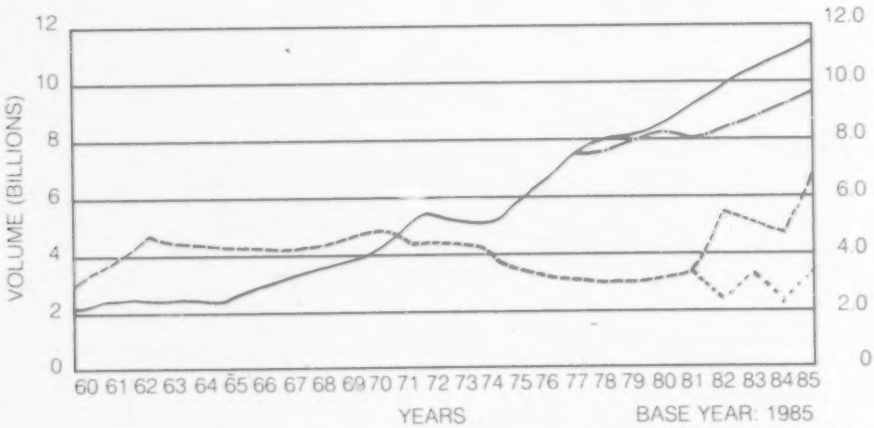
In this graph third-class bulk non-profit mail volume has been steadily increasing over the years. The upward slope of the total volume line has gradually increased over the years. The volume of third-class bulk non-profit all other and five-digit has increased. This increase in volume has taken place in spite of an increase in real price. The only explanation we have for this seeming contradiction is third-class bulk non-profit may still be a bargain, or no other reasonable alternative is available.

TOTAL VOLUME ————

AO AND 5D VOLUME —·—·—

– – – – – – – AO AND 5D REAL PRICE (MIN./PIECE)

– – – – – – – CR REAL PRICE (MIN./PIECE)



Source: Henry Folsom, Vice Chairman, Postal Rate Commission, 1985
Direct Marketing Magazine, 1985

MAJORS CONSIDERED MOST VALUABLE WHEN HIRING RECENT GRADUATES FOR ENTRY-LEVEL DIRECT MARKETING POSITIONS

	RANKING OF VALUE			
	1–2	3–5	6–8	DID NOT RANK
MARKETING	63.1%	14.0%	0.0%	23.0%
BUSINESS ADMINISTRATION	30.9%	34.8%	3.1%	31.6%
ADVERTISING	25.7%	31.7%	3.0%	39.6%
LIBERAL ARTS	20.5%	13.5%	19.1%	47.0%
ECONOMICS/FINANCE	16.1%	24.4%	14.3%	44.8%
JOURNALISM	9.1%	23.1%	13.4%	54.3%
MASS COMMUNICATIONS	6.6%	22.7%	14.8%	56.1%
NO DIFFERENCE	22.6%			

UNAIDED RESPONSES	8.7%
MATH/STATISTICS	2.2%
COMPUTERS/DATA PROCESSING	1.7%
ART	1.3%
ENGINEERING	1.3%
OTHERS	2.2%

DIRECT MARKETING POSITIONS FOR STUDENTS WITH ASSOCIATE (2 YEAR) DEGREE

CLERICAL/SECRETARIAL	44.7%
CUSTOMER SERVICE REPRESENTATIVE	18.4%
COMPUTER OPERATOR	12.6%
TELEMARKETING SALES TRAINEE	12.6%
PRODUCTION ASSISTANT	10.7%
ENTRY LEVEL/SUPPORT STAFF	9.7%
SALES TRAINEE	6.8%
ASSISTANT ACCOUNT EXECUTIVE	5.8%
LAYOUT ARTIST	5.8%
PASTE-UP ARTIST	5.8%
PROGRAMMER	5.8%
TRAFFIC COORDINATOR	5.8%
BOOKKEEPING/ACCOUNTING	4.9%
ACCOUNT EXECUTIVE	2.9%
ENGINEERING/TECHNICAL	2.9%
ASSISTANT BUYER	1.9%
ASSISTANT COPYWRITER	1.9%
DATA PROCESSOR	1.9%
MARKETING RESEARCH ASSISTANT	1.9%
SALES ANALYST	1.9%
TELEMARKETING MANAGER	1.9%
ASSISTANT MEDIA PLANNER	1.0%
COPYWRITER	1.0%
INVENTORY CONTROLLER	1.0%
OTHER	13.6%

DESIRABILITY OF AN MBA FOR ENTRY-LEVEL APPLICANTS

REQUIRED	0.8%
VERY DESIRABLE	8.2%
SOMEWHAT DESIRABLE	27.0%
DOESN'T MATTER	60.2%
NA	3.7%

Source: Direct Marketing Educational Foundation, 1985

COURSES MOST HELPFUL FOR DIRECT MARKETING CAREERS IF SPECIFIC DIRECT MARKETING COURSES ARE NOT AVAILABLE.

(1 = MOST IMPORTANT)

	RANKING OF IMPORTANCE			
	1–2	3–7	8–11	DID NOT RANK
ENGLISH COMPOSITION	42.4%	25.5%	6.0%	26.0%
ADVERTISING	37.0%	32.0%	1.5%	29.7%
COMMUNICATIONS	36.1%	33.0%	2.8%	28.3%
STATISTICS	26.5%	39.7%	5.5%	28.3%
RESEARCH METHODS	20.0%	47.5%	1.8%	30.6%
BUSINESS/TECHNICAL LETTER WRITING	17.8%	31.9%	10.1%	40.2%
COMPUTERS	14.1%	26.0%	13.6%	46.1%
PUBLIC RELATIONS	9.2%	27.8%	13.2%	49.8%
PSYCHOLOGY	8.7%	20.1%	17.3%	53.9%
SOCIOLOGY	5.0%	19.2%	21.9%	53.9%

UNAIDED RESPONSES	6.4%
MARKETING	3.7%
OTHERS	2.7%

Source: Direct Marketing Educational Foundation, 1985

DEGREE OF AGREEMENT WITH DM EDUCATION ATTITUDE STATEMENTS*

	SCHOOLS WITH DIRECT MKTG. COURSES OR CONSIDERING SUCH	SCHOOLS NOT OFFERING NOR EXPECT TO SOON	DIFFERENCE (–) MEANS MORE DISAGREEMENT
1. THE TOPIC OF DM SHOULD BE COVERED IN AN UNDERGRADUATE MARKETING CURRICULUM	1.3	1.9	–.6
2. DM SHOULD BE TAUGHT AS A SEPARATE COURSE IN AN UNDERGRADUATE MARKETING CURRICULUM.	2.3	3.9	–1.5
3. THE TOPIC OF DM CAN BE COVERED SUFFICIENTLY IN OTHER MARKETING COURSES	3.4	2.1	1.3
4. DM SHOULD BE A MAJOR OFFERED BY MARKETING DEPARTMENTS AT THE UNDERGRADUATE LEVEL.	3.8 4.2	–.4	
5. IT SHOULD BE POSSIBLE FOR STUDENTS TO TAKE COURSES WHICH PROVIDE A CONCENTRATION IN DM WITHIN THE MARKETING DEPARTMENT.	2.9	3.8	–.9
6. STUDENTS VERSED IN MARKETING ARE SUFFICIENTLY PREPARED FOR CAREERS IN DM.	3.8	3.0	.8
7. A COURSE IN DM WOULD BE LIKE A COURSE IN SALESMANSHIP-TECHNIQUE.	3.1	2.7	.4
8. DM IS THE SAME AS DIRECT MAIL	4.8	4.1	.7
9. DM IS AN INTEGRAL COMPONENT OF MARKETING STRATEGY FOR MAJOR CORPORATIONS.	2.3	2.6	–.3
10. THE GROWTH OF DM ILLUSTRATES A GROWING NEED FOR PRECISE SEGMENTATION	1.9	2.0	–.1
11. THE MONEY SPENT ON DM OF PRODUCTS IS INCREASING MORE RAPIDLY THAN THE MONEY SPENT ON OTHER METHODS OF MARKETING PRODUCTS (ADV. PROMO)	1.9	2.3	–.4
12. DM SHOULD BE TAUGHT BY JOURNALISM AND ADVERTISING DEPARTMENTS	4.0	3.8	–.2
13. TELEMARKETING IS THE FASTEST GROWING SEGMENT OF DM	2.5	3.0	–.5
14. CATALOGS WILL BE GROWING IN IMPORTANCE AS A DM TOOL.	2.3	2.3	0
15. INTERACTIVE TV WILL BE THE MOST SIGNIFICANT ADVANCEMENT IN MARKETING IN THE BALANCE OF THIS CENTURY	3.0	3.0	0
16. DIRECT MAIL IS NOT "JUNK MAIL" AS ONCE BELIEVED.	3.4	3.0	.4

*These numbers represent "mean" figures. The lower the mean score, the stronger the agreement.

Source: Kent State University, 1985

AVAILABILITY OF MATERIALS ON DIRECT MARKETING

AMONG THOSE BUSINESS SCHOOLS OFFERING A COURSE OR CONDUCTING A COURSE IN DIRECT MARKETING.

	AVAILABLE	UNAVAILABLE	UNCERTAIN
CASES	35%	20%	45%
TEXTBOOKS	28%	33%	39%
READINGS	51%	10%	30%
GUEST SPEAKERS	80%	6%	14%
INTERNSHIPS	42%	7%	51%

APPROPRIATENESS OF VARIOUS METHODS FOR TEACHING DIRECT MARKETING

NOTE: THE LOWER SCORE (CLOSER TO ONE) THE MORE APPROPRIATE THE TECHNIQUE

	SCHOOLS WITH DIRECT MARKETING COURSES OR CONSIDERING SUCH	SCHOOLS NOT OFFERING NOR EXPECT TO OFFER SOON
LECTURE	1.33	1.61
CASES	1.22	1.40
PROJECTS	1.33	1.35
TEXTBOOKS	1.61	1.59
READINGS	1.78	1.62
GUEST SPEAKER	1.33	1.62
INTERNSHIPS	1.72	1.43

DIRECT MARKETING COURSE AVAILABILITY

	PERCENT
COURSE DEVOTED EXCLUSIVELY TO DIRECT MARKETING	7%
PLAN TO OFFER A COURSE IN DIRECT MARKETING	2%
HAVE UNDER CONSIDERATION PLANS TO OFFER A COURSE IN DIRECT MARKETING	7%
HAVE CONSIDERED BUT DO NOT OFFER NOR EXPECT TO OFFER A COURSE IN DIRECT MKTG.	7%
DO NOT OFFER AND HAVE NOT CONSIDERED A COURSE IN DIRECT MARKETING	77%

Source: Kent State University, 1985

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